



California Statewide Automated Welfare System

Design Document

CA-49617

Add CW 2219 to LRS/CalSAWs for Non-Needy
Caretaker application

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/03/2020	1.0	Original Draft	Jamie Ng
05/13/2020	1.1	Updated after CW committee meeting comments	Jamie Ng

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1 OVERVIEW

This SCR is to add CW 2219 in Template Repository for non-needy caretaker cases.

1.1 Current Design

Currently, CW 2219 is currently not available in LRS/CalSAWS. Currently, the Non-needy caretaker of a relative foster child has to complete the SAWS 2 plus a long application instead of the CW 2219 application that is shorter with less root questions. SAWS 2 plus is generated manually in template repository in LRS/CalSAWS.

In C-IV, CW 2219 are available in template repository.

1.2 Requests

Add CW 2219 in LRS/CalSAWS in template repository for non- needy caretaker cases with DCFS involvement .

1.3 Overview of Recommendations

1. Create and generate in LRS/CalSAWS CW 2219 - Non-needy caretaker application as needed by worker in template repository.

1.4 Assumptions

1. Use of the CW 2219 instead of SAWS2 does not change the process and procedures for application and redetermination.
2. C-IV will inherit all changes of this SCR at migration.

2 RECOMMENDATIONS

2.1 Add CW 2219 – Application for CW (Non-Needy Caretaker Relative With Relative Foster Child) – LRS/CalSAWS

2.1.1 Overview

Currently the CW 2219 is not available in LRS/CalSAWS Template Repository. CW 2219 is used as an application for California Work Opportunity and Responsibility to kids (CalWORKs). The form is used by a Non-Needy Caretaker Relative with Relative Foster Child.

The effort is to add the CW 2219 Form (revision 5/16).

State Form: CW 2219 (5/16)

Programs: CalWORKs

Attached Forms: None

Forms Category: Form

Languages:

English and Threshold languages

(Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Spanish, Russian, Tagalog, Vietnamese)

Languages requiring translation: (Arabic, Armenian, Cambodian, Farsi, Hmong, Lao, Korean, Tagalog, Vietnamese)

2.1.2 Description of Change

Add CW 2219 in LRS/CALSAWS in English and Threshold languages.

2.1.2.1 Create CW 2219 Form XDP

Create the XDP for the new CalWORKs Form CW 2219.

Form Header: HEADER_STANDARD

Form Title: APPLICATION FOR CalWORKs

Form Number: CW 2219 (5/16)

Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #1.

2.1.2.2 Add Form Control

The form is triggered in Template Repository.

Due Date: None

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.1.2.3 Add CW 2219 to Template Repository

Add the CW 2219 Form to Template Repository with the following Document Parameters:

Required Document Parameters: Program, Case Number, Customer Name, Language

CW 2219 (5/16) will populate the following two fields when generated from Template Repository in the context of a case.

All fields are fillable similar to C-IV version of CW 2219.

Form Body Variables:

Variable Name	Population	Formatting	Editable	Template Repository Population	Populates with Form Generation
Case Name	Populates the Case Name. For Example, "John Doe"	Arial Font 10	No	Yes	N/A, only generates from Template Repository.
Case Number	Populates the Case Number. For Example, "809337372"	Arial Font 10	No	Yes	N/A, only generates from Template Repository.

2.1.2.4 Add CW 2219 Form Print Options and Mailing Requirements

The following Print options will be included for the CW 2219 Form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

Mailing Requirements:

Mailed From (Return): CW Program Worker's Office address

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: Yes

Post to YBN: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CW 2219 Mockup	CW 2219 APPLICATION FOR CALIFORNIA WORK OPPORTUNITY AND RESPONSIBILITY TO KIDS (CalWORKs)

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	Requirement met by adding CW 2219 to template repository

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?



California Statewide Automated Welfare System

Design Document

CA-201214

Add Business Reply Mail (BRM) to MC 355 Form
and MC 355 Reminder Form

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nithya Chereddy
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/28/2020	1.0	Initial write up	Nithya Chereddy
08/31/2020	1.1	Updates based on Committee Review	Nithya Chereddy

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1 OVERVIEW

MC 355 - MEDI-CAL REQUEST FOR INFORMATION and MC 355 reminder forms has been added as part of the SCR CA-50988. Effective Release Date July 22, 2019, the MC 355 and MC 355 reminder forms are mailed with a Pre-paid envelope.

Note: Currently in LRS, when a form/packet is mailed to the customer and it is expected to be returned, a Pre-paid envelope is included with standard mail envelope and Business Reply Mail (BRM) envelope is included with flat Mail envelope. Pre-paid envelope and Business Reply Mail (BRM) are considered inbound envelopes.

Pre-paid envelope will be paid for although the participant does not return the expected form/packet through mail. Using a Business Reply Mail (BRM) will only incur a cost if the participant returns the form through mail.

1.1 Current Design

LRS currently uses Pre-paid envelope for correspondence mailed in standard envelope including MC 355 and MC 355 reminder forms.

1.2 Requests

1. Add a new Business Reply Mail (BRM) header to be used with MC 355 and MC 355 reminder forms.
2. Migrate BRM office address data of C-IV counties from C-IV to LRS System.
3. Update MC 355 and MC 355 Reminder form's outbound mailing header to not populate Mailback address on the first page and to include the new BRM header on the third page of the forms.

1.3 Overview of Recommendations

1. Create a new Business Reply Mail header (BRM) and align it with the newly added BRM envelope.
2. Migrate BRM addresses from C-IV to LRS.
3. Add the new BRM header to MC 355 and MC 355 reminder forms and update MC 355 cover letter with new language.
4. Central Print test the newly added BRM header.
5. Regression test the BRM addresses for RE packets.

1.4 Assumptions

1. Any updates to the BRM in C-IV address past this effort will be addressed with subsequent SCRs.
2. The current standard outbound mailing header has office mailing address, case information, customer mailing address and District office Mailback address. With this effort District office Mailback address population will be turned off on the outbound mailing header for MC 355 and MC 355 reminder forms.
3. **SCR CA-207399** is to migrate CF and CW RE Packets from C-IV to LRS. The packets that are being migrated as part of the SCR CA-207399 will use the

- newly added BRM header for populating the return address and will use the existing outbound header without the Mailback address.
4. With this effort, the new BRM header is only added to MC 355 and MC 355 reminder forms, all other forms which currently gets mailed out with a pre-paid envelope will continue to be the same. Multiple future efforts will be implemented to replace pre-paid envelope with a BRM envelope for the rest of the forms (Please refer to **SCR CA-213514, SCR CA-47290**)
 5. The new BRM header will be used for Standard Mail envelopes for all the 58 counties.
 6. The new BRM header will be used for Flat Mail envelopes for 57 counties, excluding LA. LRS will continue to use the existing outbound mailing header for Flat Mail envelopes.
 7. **SCR CA-214196** will update and/or remove any System, Los Angeles County, or Agency references, Los Angeles County specific logos, and Director and Board of Supervisor names from the form headers. This effort is currently targeted for 20.11 release.
 8. Mock office data will be used for testing migrated C-IV BRM addresses. Refer to Supporting Document #8 for office data.
 9. Client Correspondence team will provide the coordinates of the BRM barcode to the Technical Architecture team.
 10. Regression test all the RE packets to verify the Centralized BRM addresses.
 11. Currently MC 355 and MC 355 reminder forms include a Pre-Paid envelope, but with this SCR, Pre-Paid envelope will be replaced with a BRM envelope. After this SCR goes live, workers are only supposed to reprint the MC 355 or MC 355 Reminder forms locally, this condition is only for the forms that were generated before the go live date of this SCR. Reprinting centrally will error out the forms that were generated before the go live date of this SCR. A CIT will be sent to inform about this update. Reprint centrally and Reprint locally options will function the same way as they function today for the MC 355 and MC 355 Reminder forms that are generated after this SCR goes live.
Scenario 1: Form will error out if the form is generated on 11/3/2020, SCR goes live on 11/23/2020 and the worker is trying to reprint the form centrally on 12/1/2020.
Scenario 2: Form will not error out if the form is generated on 11/24/2020, and the worker is trying to reprint the form locally/centrally on 12/1/2020.
 12. The bundling job is only available for LA County. The bundling jobs for the Migration Counties will be migrated with **SCR CA-207312**, therefore testing of the bundles is not possible at this time.
 13. This SCR adds BRM header in threshold languages (mentioned in the recommendation 2.1.1) As MC 355 is only available in English and Spanish currently, the new BRM header cannot be tested in threshold languages with this SCR. Threshold headers can be tested with the SCR CA-213514.

2 RECOMMENDATIONS

2.1 Create Business Reply Mail (BRM) Header

1. This effort is to create a new BRM header which will populate the BRM address for the form to be returned. BRM header will have the following details.
 - Permit Number
 - County Name
 - Case and Worker information
 - BRM Barcode
 - Business Reply Mail Address

2.1.1 Create BRM Header XDP

1. Create a new BRM Header XDP in English and all the threshold languages with the following information.
 - Permit Number
 - County Name
 - Case and Worker information
 - BRM Barcode
 - Business Reply Mail Address
2. Do not add BRM header to Template Repository.

The mockup shows a form with five distinct sections, each enclosed in a red rectangular border and labeled with a red number in the top-left corner:

- <1>** FIRST-CLASS MAIL PERMIT NO.<Permit Number>
POSTAGE WILL BE PAID BY ADDRESSEE
- <2>** COUNTY OF <COUNTY NAME>
Date: <Date>
Case Name: <Case Name>
<Continuation>
- <3>** Case Number: <Case Number>
Worker Name: <Worker Name>
Continuation
Worker ID: <Worker Id>
Worker Phone Number: <Worker ph no>
Customer ID: <Customer Id>
- <4>** [Barcode]
- <5>** Business Reply Mail Address Line 1
Business Reply Mail Address Line 2
Business Reply Mail Address Line 3
Business Reply Mail Address Line 4

Figure: 2.1.1.1 – New BRM header

Refer to Supporting Document #1 for BRM header mockup.

Note: BRM header will be added in the following threshold languages.

Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog,
Hmong, Korean, Lao, Russian, Vietnamese

2.1.2 Add Data Population to the BRM header

1. Following is the data population for the newly added BRM header.

Field	Population	Formatting	Editable
<1> Permit Number	Refer to sub-section 'Populate Permit Number' for Permit Number Population details	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.
<2> County Name	Populate the County Name that the form is being generated for	Arial Font Size 11*, bold	No
<3> Case and Worker details	Populate case information and worker details based on the existing logic for the standard header (Header_1_EN.xdp)	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.
<4>	BRM Barcode	Barcode Font 1* Barcode Height 27*	Populate the BRM barcode based on the Barcode value (CT 1622, REFER_TABLE_11_DESCR)
<5> Business Reply Mail Address	Populate BRM Address based on the BRM zip code and the outbound mail type. Note: For MC 355 outbound mail type is standard mail.	Arial Font Size 10*	Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.

Font for threshold headers will be based on the Project Standards and font size will vary from language to language.

2. Text highlighted for fields <1>, <2>, <5> (refer to the figure 2.1.1.1) will be in English irrespective of the form language.
3. Text highlighted for field <3> will populate based on the generated form language.

Refer to Supporting document #9 for Threshold BRM Header Mockup.

Note: The formatting listed above, for the BRM header is subject to change depending on the Central Print testing.

2.1.2.1 Populate Permit Number

Populate the Permit Number on the BRM header based on the following conditions.

- If the form for which BRM header is being added has a centralized office associated to it, populate the permit number (refer_table_1_descr from CT 1622) of the centralized office associated to the case.
- If the form for which BRM header is being added has a district office associated to it, then populate the permit number (refer_table_1_descr from CT 1622) of the district office associated to the case.
- Permit Number Format
 - If permit number (refer_table_1_descr from CT 1622) is 50792 LOS ANGELES CA, the permit number format will be 50792(3 Spaces)LOS ANGELES CA
 - Format: 50792 LOS ANGELES CA

2.2 Migrate BRM data

2.2.1 Overview

This effort is to migrate the BRM office addresses from C-IV to LRS.

2.2.2 CT 1622 Migration

1. Migrate the BRM address data from C-IV to LRS.

Refer to Supporting Document #6 for the complete CT 1622 data and Supporting Document #7 for the consolidated BRM addresses for testing purposes.

2.3 Update the Bundler Priority

2.3.1 Overview

Currently MC 355 and MC 355 reminder forms are being sent to the print vendor in Priority 6 bundle. As the instructions to print vendor are to

include a Pre-paid envelope with Priority 6 bundles, MC 355 cannot use Priority 6 going forward as a BRM needs to be included.

In the past, in LRS, a new priority was introduced per each individual functionality required for a bundle, but with this effort, instead of creating a new priority for including BRM for MC 355, the existing Priority 1 is being leveraged.

2.3.2 Update Bundler Priority

1. Priority 1 is currently used for forms that does not need any return envelope.
2. Update MC 355 and MC 355 reminder forms to get bundled with Priority 1.
Note: Procurement team will communicate with the print vendor to include a BRM for the Priority 1 bundle (new bundle name/standard) which includes MC 355.

2.4 Update MC 355 form header

2.4.1 Overview

The effort is to update the outbound mailing header and the language on the MC 355 coversheet and to add the new BRM header to MC 355 form.

State Form: MC 355

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Form

Existing Languages: English and Spanish

2.4.2 Update MC 355 XDP

1. Update the MC 355 XDP to not populate the Mailback address on the outbound mailing header.
2. Update the MC 355 XDP to replace the existing header on the third page with the new BRM header.
3. Update the language on the coversheet.

Current Language on the Coversheet:

The information requested is needed to establish your continued eligibility for Medi-Cal benefits. Please return this coversheet and place on top of any verification document(s) in the enclosed envelope.

Updated Language on the Coversheet - English:

For Mailing Purposes Only

Please remove this page before returning the attached form.

Updated Language on the Coversheet - Spanish:

Solo Para Propósitos De Envió,
Favor de remover esta pagina antes de regresar la forma

Updated Languages: English and Spanish

Form Mockups/Examples: See Supporting Documents #2, #3 for updated MC 355 form in English and Spanish.

2.4.3 Central Print Test the New Headers

1. Perform central print testing on MC 355 form to align BRM address header to the inbound mailing envelope.

2.4.4 Populate Centralized BRM address on the MC 355 Form

MC 355 form needs to be routed back to the centralized office address listed below for LA county.

DPSS – CSU III – NORTHRIDGE

9451 CORBIN AVE STE 200

NORTHRIDGE CA 91324-9935

Technical Details:

Permit Number for Standard Mail BRM (CT 1622 REFER_TABLE_1_DESCR):
50792 LOS ANGELES CA

Following are the details used to encode the Standard Mail BRM Barcode for MC 355.

Barcode ID: 00

Special Services: 708

Mailer ID: 901498004

Serial Number: 0000000

Delivery Point ZIP Code: 913249935

Following is the Encoded Barcode value for Standard Mail Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

DDAADDADTTFFDTFTTDFDDTATAFFFDATATDAAFFTDADFFDADAFFADFDT AFDFAATTA
--

Note: Although the centralized office location for MC 355 form and the RE packets is the same, the barcode will be different for MC 355 and RE packets as Centralized Office address associated to MC 355 will have a different mailer ID from RE packets. This is because with the new Mailer ID for the MC 355, the cost for returning the envelope will be based on standard mail instead of Flat mail for which the BRM postage cost is high.

2.4.5 Update Tracking Barcode

MC 355 currently populates tracking barcode on the 1st page of the form. Update MC 355 to populate the tracking barcode on the 3rd page of the form.

2.5 Update MC 355 Reminder Form Header

2.5.1 Overview

The effort is to update the outbound mailing header and the language on the MC 355 reminder form coversheet and to add the new BRM header to MC 355 reminder form.

State Form: MC 355 Reminder form

Current Programs: Medi-Cal

Current Attached Forms: N/A

Current Forms Category: Form

Existing Languages: English and Spanish

2.5.2 Update MC 355 XDP

1. Update the MC 355 reminder form XDP to not populate the BRM address on the outbound mailing header.
2. Update the MC 355 reminder form XDP to replace the existing header on the third page with the new BRM header.
3. Update the language on the coversheet.

Current Language on the Coversheet:

The information requested is needed to establish your continued eligibility for Medi-Cal benefits. Please return this coversheet and place on top of any verification document(s) in the enclosed envelope.

Updated Language on the Coversheet - English:

For Mailing Purposes Only

Please remove this page before returning the attached form.

Updated Language on the Coversheet - Spanish:

Solo Para Propósitos De Envío,

Favor de remover esta pagina antes de regresar la forma

Updated Languages: English and Spanish

Form Mockups/Examples: See Supporting Documents #4, #5 for updated MC 355 reminder form in English and Spanish.

2.5.3 Central Print Test the New Headers

1. Perform central print testing on MC 355 reminder form to align BRM address header to the inbound mailing envelope.

2.5.4 Populate Centralized BRM address on the MC 355 Reminder Form

MC 355 Reminder form needs to be routed to the centralized office address listed below for LA county.

DPSS – CSU III – NORTHRIDGE

9451 CORBIN AVE STE 200

NORTHRIDGE CA 91324-9935

Technical Details:

Permit Number for Standard Mail BRM (CT 1622 REFER_TABLE_1_DESCR):
50792 LOS ANGELES CA

Following are the details used to encode the Standard Mail BRM Barcode for MC 355 reminder form.

Barcode ID: 00

Special Services: 708

Mailer ID: 901498004

Serial Number: 000000

Delivery Point ZIP Code: 913249935

Following is the Encoded Barcode value for Standard Mail Centralized BRM address (CT 1622 REFER_TABLE_11_DESCR)

DDAADDADTTFFDTFTTDFDDTATAFFFDATATDAAAFFTDADFFDADAFFADFD TAFDFAATTA

Note: Although the centralized office location for MC 355 reminder form and the RE packets is the same, the barcode will be different for MC 355 reminder form and RE packets as Centralized Office address associated to MC 355 reminder form will have a different mailer ID from RE packets. This is because with the new Mailer ID for the MC 355 reminder form, the cost for returning the envelope will be based on standard mail instead of Flat mail for which the BRM postage cost is high.

2.5.5 Update Tracking Barcode

MC 355 reminder form currently populates tracking barcode on the 1st page. Update MC 355 reminder form to populate the tracking barcode on the 3rd page.

2.6 Regression Test RE Packets

2.6.1 Overview

1. As part of the SCRs CA-205400, CA-205637, CA-205638, BRM addresses for RE packets were centralized. Addresses in CT1622 were updated to the centralized address as part of these efforts. This effort is to create a framework to efficiently look up the BRM address based on the address type per form.

2.6.2 Technical Implementation and Regression Test

1. Regression test all the RE packets to verify the centralized BRM address. Refer to Supporting Document #10 for the list of all the RE packets.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Client Correspondence	BRM Header	BRM Header Mock up.pdf
2.	Client Correspondence	Updated MC 355 - English	English Updated MC 355 Mock up.pdf
3.	Client Correspondence	Updated MC 355 - Spanish	Spanish Updated MC 355 Mock up.pdf
4.	Client Correspondence	Updated MC 355 Reminder - English	English Updated MC 355 Reminder Mock up.pdf
5.	Client Correspondence	Updated MC 355 Reminder - Spanish	Spanish Updated MC 355 Reminder Mock up.pdf
6.	Client Correspondence	BRM Office Addresses Data	CT1622.xls
7.	Client Correspondence	Consolidated BRM Addresses (for test validations)	Consolidated BRM Addresses.xls
8.	Client Correspondence	Mack Office Data	Office data.xls
9.	Client Correspondence	Threshold BRM Header	Threshold BRM Header.docx

10.	Client Correspondence	List of RE packets	List of all RE packets.pdf
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4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1991	8. The LRS shall accommodate various envelope sizes for mailing while conforming to USPS standards for mail piece size.	With SCR CA-201214, new BRM header is being added to LRS/CALSAWS system and MC 355 and MC 355 forms are updated to use this new BRM header.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

[Include any specific outreach that needs to occur with implementation i.e. a CIT, a special webcast or onsite demonstration, any lists, etc...]

6.1 Lists

[Include a summary of the list(s). If there is more than one list, separate them with a numbered list and include the Location and Standard Columns only once in the overall summary.]

List Name: <List Name>

List Criteria: <Describe criteria for generating list>

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): <list additional columns, if any>

Frequency: <One-time, monthly, quarterly, etc.>

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CA-XXXXXX
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CIV-XXXXXX

7 APPENDIX


[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc....]



Design Document

CA-201756 CIV-103745 NOMI Due Date Update.

1/4/2019

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Priya Sridharan
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/2/2018	.01	Initial Design	Priya Sridharan
1/4/2019	.02	Reviewed and made verbiage changes as per the standards	Ramya Raghuraman
2/19/2019	.03	Updated to address BA review comments	Anand Kulkarni

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1 OVERVIEW

System generates a Notice of Missed Interview (NOMI) form, when the CalFresh intake interview appointment is missed for a CalFresh intake case. The NOMI reads, "You must complete your interview with us by <Date>". The <Date> on the NOMI form is 10 working days from the initial missed appointment date. Per Policy 63-300.461, the date on the NOMI form is to be modified to 30 calendar days from the next day of the application date instead of 10 working days from the missed appointment date. The CalFresh Denial NOA for missed interview appointment (F374D) currently generates on 30th day from the application date. The denial NOA generation to be modified to align with NOMI date. The denial NOA will generate on the 30th day from the application date but if 30th day falls on a weekend or holiday, the NOA will generate on next business day.

Ex. The household applied 11/1/2018, missed the interview on 11/5/2018. The NOMI should generate on the night of 11/5/2018 and stated that the household must complete the interview by 12/3/2018 (30th calendar day from 11/2/2018 is 12/1/2018 which falls on weekend, so the due date will be the next business day 12/3/2018). When the household fails to complete the interview, the CalFresh denial NOA for missed interview appointment will generate on 12/3/2018.

1.1 Current Design

The date on Notice of Missed Interview (NOMI) form is 10 working days from the missed appointment date. The CalFresh Denial NOA for missed interview appointment (F374D) currently generates on 30th day from the application date.

1.2 Requests

- Update the interview due by date on "Notice of Missed Interview (NOMI)" form to 30 calendar days from the next day of the application date.
- Update the denial NOA generation to be in alignment with NOMI due date.
- Update CF 386 Spanish (NOMI) with the latest state version.

1.3 Overview of Recommendations

- Update interview due by date on "Notice of Missed Interview (NOMI)" form to be 30 calendar days from the next day of the application date. If 30th day falls on a weekend or holiday, then the due date to be next business day.
- Update The denial NOA generation to be in alignment with NOMI due date. The denial NOA will be modified to generate on the 30th day from the next day of the application date but if 30th day falls on a weekend or holiday it should generate on the next business day.
- Update CF 386 Spanish NOMI to match the state version.

1.4 Assumptions

There are no assumptions made.

2 RECOMMENDATIONS

2.1 Notice of Missed Interview Form

2.1.1 Overview

The Interview completion due by date on the NOMI Form, CF 386 is 10 working days from the initial missed appointment date. Per Policy 63-300.461, the date on the NOMI form to be modified to 30 calendar days from the next day of the application date.

2.1.2 Description of Change

The Interview completion due by date on CF 386 - Notice of Missed Interview (NOMI) will be modified to 30 calendar days from the next day of the application date. If 30th day falls on a weekend or holiday, then the due date will be set to the next business day.

The Spanish version of CF 386(NOMI) will be revised to match the state version. Refer the FDD attached in the supporting document section for template and data population.

2.2 Denial NOA for Missed Interview (F374D)

2.2.1 Overview



The denial NOA generation to be modified to align with NOMI due date. The denial NOA for NOMI will be generated on the 30th day from the next day of the application date but if 30th day falls on a weekend or holiday, then NOA will be generated on the next business day.

2.2.2. Description of Change

The denial NOA generation will be modified to generate the notice on 30th day from the next day of the application date but if 30th day falls on a weekend or holiday it will generate on the next business day.

Ex. The household applied 11/1/2018, missed the interview on 11/5/2018. The NOMI should generate on the night of 11/5/2018 and stating that the household must complete the interview by 12/3/2018. When the household fails to complete the interview, the CalFresh denial NOA for missed interview appointment will generate on 12/3/2018.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Functional Design Document of CF 386 – Notice of Missed Interview (NOMI)	 FD_FRM_CF386.docx
2	Client Correspondence	SPD of Denial NOA F374D	 NOA_F374D_6482_S PD.Doc.docx

DRAFT



California Statewide Automated Welfare System

Design Document

CA-211332 | CIV-105397

ACL 20-03 CalWORKs Child Care NOAs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/24/20	1.0	Initial Creation	Connor Gorry
8/25/20	1.1	Updates per region feedback	Connor Gorry

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1 OVERVIEW

ACL 19-99 dated October 4, 2019 outlines three stages of CalWORKs Child Care. The changes made with this SCR are relevant to Stage One, which provides Child Care to CalWORKs families as they first engage in the program.

This change will ensure that the Stage One NOAs – NA 832, NA 833, NA 834, and NA 835 – are present, aligned, and up to date in both systems.

1.1 Current Design

Four Child Care Stage One notices currently exist in the C-IV system and will be brought up to date as a part of this change. Of these four notices, three were migrated to LRS/CalSAWS with recent migration SCRs:

- NA 832 – Child Care Services Approval (10/14) will migrate with CA-211768 in the 20.07 Release
- NA 834 – Child Care Services Denial (8/15) will migrate with CA-211776 in the 20.07 Release
- NA 835 – Child Care Services Discontinuance (10/17) will migrate with CA-211751 in the 20.09 Release

NA 833 – Child Care Services Change (10/14) – has not been migrated to the LRS/CalSAWS. Instead, the latest version (4/20) will be added to LRS/CalSAWS with this change, and it will be updated to the latest version in C-IV.

1.2 Requests

1. Revise (C-IV) or Add (LRS/CalSAWS) the CW Stage One Child Care Notices per ACL 20-03.

1.3 Overview of Recommendations

1.3.1 Update Form NA 832 to the 3/20 version in both systems

1.3.2 Update Form NA 833 to the 4/20 version in C-IV

1.3.3 Add Form NA 833 to the 4/20 version in LRS/CalSAWS

1.3.4 Update Form NA 834 to the 3/20 Version in both systems

1.3.5 Update Form NA 835 to the 3/20 version in both systems

1.4 Assumptions

1. No additional changes will be made to these Forms beyond what is described in this design. No additional variable population will be added with this change, beyond what is outlined in this design.
2. Facets such as document input parameters, form control, print options, etc. will remain unchanged from migration for all forms being updated. For details, please [see Appendix](#).
3. This change will only add/update these four Forms in English and Spanish. Threshold Languages will be added with SCRs CA-212089 and CIV-105751.
4. Automation of the current CCP 7 will be handled as a part of a future effort, through SCRs CA-217788 and CIV-107561.
5. All four NOAs will use the NA Back 9 (4/13) that is currently standard in both systems.
6. The NA 832 will maintain capability to be generated for up to four children selected from the Child Care Certificates Page. If the NOA needs to be generated for more than four children, the worker should use the same method to generate a second NA 832 NOA, this time selecting any children not included the first time the NOA was generated.

2 RECOMMENDATIONS

2.1 Update Form NA 832 to the 3/20 version in both systems

2.1.1 Overview

NA 832 is the Child Care Services Approval NOA. The 10/14 version currently exists in C-IV and was migrated to LRS/CalSAWS with CA-211768. This change will update the NA 832 to the latest version in both systems.

State Form: NA 832 – Child Care Services Approval

Current Programs: CW/Child Care (C-IV), Child Care (LRS)

Current Attached Form(s): None

Current Forms Category: NOA (C-IV), Forms (LRS)

Existing Languages:

English and Spanish

2.1.2 Update the NA 832 XDP

NA 832 XDP will be updated to the newest state version (3/20). Revisions to the Form provide CWDs with the ability to approve Stage One Child Care services for 12 months or until the participant is transferred to Stage Two or is otherwise ineligible. This revision also includes the updated WIC Section 11323.4.

Form Title: Child Care Services Approval*

Form Number: NA 832

Forms Category: NOA (C-IV), NOA** (LRS)

Include NA Back 9: Yes (4/13 version)

Form Mockups/Examples: See [Supporting Documents #1](#)

Updated Languages:

English and Spanish

*Form Title in LRS is currently "Child Care Certificates (Stage 1)". Form Title in C-IV is currently "Child Care Approval (Stage 1)". These will be updated to the above for clarity and to match the State-provided title.

**NA 832 is currently categorized as "Forms" in LRS/CalSAWS

- NA 832 page 1 (Page 1 of 3)
- NA Back 9 (4/13) (Page 2 of 3)
- NA 832 page 2 (Page 3 of 3)

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2.1.3 Updates to Form Generation (LRS Only)

NA 832 can only be generated from the LRS Template Repository for the Child Care Program.

New Program Generation: Child Care

2.1.4 Updates to Form Variable Population

Currently, variables populate by with the information for up to four children from the Service Arrangement. In the **Child Care Services** section, the begin date currently populates from the Service Arrangement Page for all children. The new version adds the population for an End-date as well.

The below table details new variable population logic. For a full table of NA 832's variable population, including variables whose population is not being updated, [see the Appendix](#).

#	Variable Name	Population	Formatting	Editable	Template Repository Population	Populates with Form Generation
1	End Date	SERV_ARRGMT.PERIOD_END_DATE	Arial, Size 9	Y	N	Y
2	Child(ren) Name(s)	Populate each line with the name of up to four children. This/These will be the same name(s) that populate in the boxes in the right-hand column.	Arial, Size 9	Y	N	Y

Variables requiring translation: None.

2.2 Update Form NA 833 to the 4/20 version in C-IV

2.2.1 Overview

NA 833 is the Child Care Services Change NOA. The purpose of this revision to the NA 833 is to provide additional clarity regarding TrustLine retroactive payments. NA 833 currently has no variable population outside of the standard header and customer information, and no additional population will be added with this change.

State Form: NA 833 – Child Care Services Change

Current Attached Form(s): None

Current Forms Category: NOA (C-IV)

Existing Languages:

English and Spanish

2.2.2 Update the NA 833 XDP

Form Title: Child Care Services Change*

Form Number: NA 833

Forms Category: NOA

Include NA Back 9: Yes

Form Mockups/Examples: See [Supporting Documents #2](#)

Updated Languages:

English, Spanish

*Form Title currently reads “Child Care Amendment NOA”. This will be updated to match State title.

Order of impressions:

- NA 833 page 1 (Page 1 of 3)
- NA Back 9 (4/13) (Page 2 of 3)
- NA 833 page 2 (Page 3 of 3)

2.3 Add NA 833 (4/20) in LRS/CalSAWS

The NA 833 Form must also be added to the LRS/CalSAWS template repository.

2.3.1 Overview

Add NA 833 – Child Care Services Change – to the LRS/CalSAWS Template Repository in English and Spanish.

State Form: NA 833

Programs: Child Care

Attached Forms: N/A

Forms Category: NOA

Form Mockups/Examples: See Supporting Documents #2

2.3.2 Create NA 833 Form XDP

NA 833 is the Child Care Services Change NOA. It is a two-page Form, and the NA Back 9 attached. It will also have a 'Notes' section on the right-hand column of its first page.

Form Header: Use the same header as NA 832

Form Title: Child Care Services Change

Form Number: NA 833

Include NA Back 9: Yes

Order of impressions:

- NA 833 page 1 (Page 1 of 3)
- NA Back 9 (4/13) (Page 2 of 3)
- NA 833 page 2 (Page 3 of 3)

2.3.3 Add NA 833 (4/20) to the CalSAWS Template Repository

Required Document Parameters: Case Number, Customer Name, Language, Program

2.3.4 Add Form Control

Add an Imaging Barcode to NA 833.

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.3.5 Add NA 833 Form Print Options and Mailing Requirements

The following Print Options will be included for the NA 833:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
X	X	X	X	X	X

Mailing Requirements:

Mail-To (Recipient): Customer Selected from the drop-down

Mailed From (Return): Worker assigned to the program selected on the Document Parameters Page

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: None

Additional Requirements:

Special Paper Stock: N/A

Enclosures: No

Electronic Signature: No

Post to YBN/C4Y: Yes

2.4 Update NA 834 to the 3/20 version in Both Systems

2.4.1 Overview

Update NA 834 – Child Care Services Denial – to the 3/20 version in both systems.

State Form: NA 834

Programs: Child Care

Attached Forms: N/A

Forms Category: NOA (C-IV and LRS/CalSAWS)

Form Mockups/Examples: See Supporting Documents #3

2.4.2 Update the NA 834 XDP

Form Title: Child Care Services Denial

Form Number: NA 834

Forms Category: NOA

Include NA Back 9: Yes (attach the 4/13 version of the NA Back 9 as Page 2)

Form Mockups/Examples: See Supporting Documents #3

Updated Languages:

English, Spanish

Order of impressions:

- NA 834 page 1 (Page 1 of 3)
- NA Back 9 (4/13) (Page 2 of 3)
- NA 834 page 2 (Page 3 of 3)

2.4.3 Updates to Form Generation (LRS Only)

NA 834 can only be generated from the LRS Template Repository for the Child Care Program.

New Program Generation: Child Care

2.5 Update NA 835 to the 3/20 version in Both Systems

2.5.1 Overview

Update Form NA 835 – Child Care Services Discontinuance NOA – to the 3/20 version in both systems.

State Form: NA 835 – Child Care Services Discontinuance

Programs: Child Care

Attached Forms: N/A

Forms Category: NOA (C-IV and LRS/CalSAWS)

Form Mockups/Examples: See Supporting Documents #4

2.5.2 Update the NA 835 XDP

Form Title: Child Care Services Discontinuance

Form Number: NA 835

Forms Category: NOA

Include NA Back 9: Yes

Form Mockups/Examples: See [Supporting Documents #4](#)

Updated Languages:

English, Spanish

Order of impressions:









- NA 835 page 1 (Page 1 of 3)
- NA Back 9 (4/13) (Page 2 of 3)
- NA 835 page 2 (Page 3 of 3)

2.5.3 Updates to Form Generation (LRS Only)

NA 835 can only be generated from the LRS Template Repository for the Child Care Program.

New Program Generation: Child Care

3 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	NA 832 (3/20)	CC	State Updated Version of the NA 832 – Child Care Services Approval	 NA 832 (3/20) w/ NA Back 9
2	NA 832 (3/20) Spanish	CC	State Updated Version of NA 832, Spanish	 NA 832 (3/20) SP
3	NA 833 (4/20)	CC	State Updated Version of the NA 833 – Child Care Services Change	 NA 833 (4/20) w/ NA Back 9
4	NA 833 (4/20) Spanish	CC	State Updated Version of NA 833, Spanish	 NA 833 (4/20) SP
5	NA 834 (3/20)	CC	State Updated Version of the NA 834 – Child Care Services Denial	 NA 834 (3/20) w/ NA Back 9
6	NA 834 (3/20) Spanish	CC	State Updated Version of NA 834, Spanish	 NA 834 (3/20) SP
7	NA 835 (3/20)	CC	State Updated Version of the NA 835 – Child Care Discontinuance NOA	 NA 835 (3/20) w/ NA Back 9
8	NA 835 (3/20) Spanish	CC	State Updated Version of NA 835, Spanish	 NA 835 (3/20) SP

4 REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.6 CAR-1242	The LRS shall support the central production and mailing of notices, NOAs, forms, letters, stuffers, and flyers by program.	This change updates and adds support for four notices pertaining to Child Care Programs.
2.18.1.2 CAR-1206	The LRS shall generate written material, including notices, NOAs, forms, flyers, letters, and stuffers, to applicants, participants, caregivers, sponsors, authorized representatives, and/or any other entities, in English, all threshold languages, and any other language for which the State has provided a translation.	This change updates/adds four Forms to the latest state version(s).

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

7.1 NA 832 Additional Information

Required document parameters, imaging barcode, print options, mailing requirements, and portal posting information for NA 832 as written in migration SCR CA-211768:

1. Add the NA 832 – Child Care Approval (Stage 1) form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

2. Add the following barcode options to the NA 832 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. Add the following print options to the NA 832 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the Child Care Program
Mailed From (Return): Office Address of the worker assigned to the Child Care Program

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: Yes

7.2 NA 834 Additional Information

Required document parameters, imaging barcode, print options, mailing requirements, variable population, and portal posting information for NA 834 as written in migration SCR CA-211776:

1. Add the NA 834 – Child Care Denial NOA to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

2. Populate the following elements on the NA 834 when the form is triggered from Template Repository.

Section	Field	Description
NA 834 Page 1	Starting on – Date Field	Will be populated with Begin Date of a Child Care program with Denied status.

3. Add the following barcode options to the NA 834 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. Add the following print options will for the NA 834 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Primary Applicant of the Child Care Program
Mailed From (Return): Office Address of the worker assigned to the
Child Care Program
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A
Electronic Signature: N/A
Post to YBN/C4Y: Yes

7.3 NA 835 Additional Information

Required document parameters, imaging barcode, print options, mailing requirements, variable population, and portal posting information for NA 835 as written in migration SCR CA-211751:

1. Add the NA 835 – Child Care Discontinuance NOA to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

2. LRS/CalSAWS Standard Header will be populated with worker and case information. Apart from that, the following elements on the NA 835 will be populated when the form is triggered from Template Repository.

Section	Field	Description
NA 835 Page 1	Stop on – Date Field	Will be populated with Begin Date of a Child Care program with Discontinued status. Format: MM/DD/YYYY

3. Add the following barcode options to the NA 835 Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

4. Add the following print options for the NA 835 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Customer selected from the drop-down

Mailed From (Return): Office Address of the worker assigned to the Child Care Program
 Mail-back-to Address: N/A
 Outgoing Envelope Type: Standard
 Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A
 Enclosures: N/A
 Electronic Signature: N/A
 Clock Indicator: N
 Post to YBN/C4Y: Yes

7.4 Full NA 832 Variable Population Table

This table, taken from Migration SCR CA-211768, contains info on variable population for all variables on the NA 832 NOA. The two new variables with logic added in this SCR are in **highlighted and bold**.

Section	Field	Description	Editable?	Template Repository Population	Populates with Form Generation
NA 832 Page 1	You are approved for child care services starting on – <i>Checkbox Field</i>	If SERV_ARRGMT.PERIOD_BEG_DATE exists	Y	N	Y
NA 832 Page 1	You are approved for child care services starting on – <i>Date Field</i>	SERV_ARRGMT.PERIOD_BEG_DATE	Y	N	Y
NA 832 Page 1	...through – Date Field	SERV_ARRGMT.PERIOD_END_DATE	Y	N	Y
NA 832 Page 1	Child(ren) Name(s)	Populates in-line with the names of all child(ren) – up to four – using CERT_DETL.PERS_ID	Y	N	Y
NA 832 Page 1	You have chosen an eligible child care provider – <i>Checkbox Field</i>	Checked - If at least one record is selected on Child Care Certificates List page.	Y	N	Y

NA 832 Page 1	Child Name	CERT_DETL.PERS_ID	Y	N	Y
NA 832 Page 1	Provider name	ORG.ORG_NAME	Y	N	Y
NA 832 Page 1	Child Care Hours	Calculate Number of Hours using CHILD_SCHED.END_TIME and CHILD_SCHED.BEG_TIME and CHILD_SCHED.TYPE_CODE = "RE"	Y	N	Y
NA 832 Page 1	Rate	CHILD_CARE_RATE.RATE_AMT	Y	N	Y
NA 832 Page 1	Reimbursement Limit	CHILD_CARE_RATE.RATE_AMT and CHILD_CARE_RATE.CARE_TYPE_CODE IN ('WE', 'MO') which will be populated in \$0.00/frequency format. For example, if the RATE_AMT is \$3.00 and the frequency is hourly, the field will be populated with \$3.00/hour. Frequency Type: hour, day, week, month	Y	N	Y

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR 214026 – Kiosk, Mobile, Portal

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Kim
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/4/2020	1.0	Initial design.	Jennifer Kim
8/28/20	2.0	Replace Applicable Date data attribute with Separation ID in Store Document Web Service. Add Bundle ID data attribute in Store Document Web Service.	Jennifer Kim
9/10/20	3.0	Implement DCR and change some data attributes in the Store Document Web Service.	Jennifer Kim

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1 OVERVIEW

The new Imaging System requires that customer-submitted images and documents are uploaded to the CalSAWS Imaging System. The image/document upload will follow the existing ingestion model.

This SCR addresses two outbound web services to store and route documents in and to the CalSAWS Imaging System in that order: Store Document and Route Document Web Services. The Store Document Web Service stores case, confidential case or person-level documents in the CalSAWS Imaging System. The Route Document Outbound Web Service routes documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service.

1.1 Current Design

1. There are no established web services between the CalSAWS Imaging System and Image Upload Sources to store case, confidential case or person-level documents in the CalSAWS Imaging System.
2. There are no established web services between the CalSAWS Imaging System and Image Upload Sources to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after storing the document.

1.2 Requests

1. Create a new outbound web service to store case, confidential case or person-level documents into the CalSAWS Imaging System. Create three different request parameters for the Store Document Outbound Web Service to send the document to its appropriate Case, Confidential Case or Person Drawer in the Imaging System: Store Case Document Request, Store Confidential Case Document Request and Store Person Document Request.
2. Create a new outbound web service to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service.
3. Modify the C-IV Kiosk Application to upload documents to the new CalSAWS Imaging System.
4. Modify the LRS Lobby Check-In Application to upload documents to the new CalSAWS Imaging System.

1.3 Overview of Recommendations

1. Create a Store Document Outbound Web Service to store case, confidential case or person-level documents in the CalSAWS Imaging System. Create three different request parameters for the Store Document Outbound Web Service to send the document to its appropriate Case, Confidential Case or Person Drawer in the Imaging System: Store Case Document Request, Store Confidential Case Document Request and Store Person Document Request.

2. Create a Route Document Outbound Web Service to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service.
3. Update the C-IV Kiosk Application to upload documents to the new CalSAWS Imaging System.
4. Update the LRS Lobby Check-In Application to upload documents to the new CalSAWS Imaging System.

1.4 Assumptions

1. The LRS Self-Service Check-in iOS Application, since it is dependent on the Self-Service State-wide Portal, will be updated when the Self-Service Solution is completed (SCR CA-217869).
2. These functionalities will not apply to the new self-service portals or mobile apps until future SCRs address them.
3. These functionalities will not be available to counties that have not been enabled on the new imaging solution (Hyland).

DRAFT

2 RECOMMENDATIONS

2.1 Store and Route Document Outbound Web Services

2.1.1 Overview

The Store Document Outbound Web Service will be invoked to store images and documents in the CalSAWS Imaging System. The Store Document Outbound Web Service will offer three different request parameters to store documents in either the Case, Confidential Case or Person Drawer.

The Route Document Web Service will route documents to the appropriate queue in the Imaging System after invoking the Store Document Web Service. The Pre-Archive Processing Queue is where documents that have been fully indexed and categorized are routed to in the Imaging System. The Start Workflow Queue is where indexing values must be properly verified due to the inability to do so prior.

2.1.2 Description of Change

1. Create the 'Store Document Outbound Web Service' that will allow images to be stored in the CalSAWS Imaging System:
 - a. Create the Store Case Document Request Parameters, in which the Image Upload Source sends Case and if applicable, Barcode and Form Information to store documents in the Imaging System. Please refer to the table "Store Case/Confidential Case Document Request Parameters" for additional details.
 - b. Create the Store Confidential Case Document Request Parameters, in which the Image Upload Source sends the same data elements as the Store Case Document Request Parameters to store documents in the Imaging System. Please refer to the table "Store Case/Confidential Case Document Request Parameters" for additional details.
 - c. Create the Store Person Document Request Parameters, in which the Image Upload Source sends Person and if applicable, Barcode and Form Information to store documents in the Imaging System. Please refer to the table "Store Person Document Request Parameters" for additional details.
2. Include data attributes in the Document Notes field of the Store Document Web Service Request, as the worker may need to know the original and other indexing values later in the Imaging Workflow. Append notes to the Document Notes Field that add data attributes in and, if applicable, data attributes not present in the Request Parameters. Please refer to the tables "Store Case/Confidential Case Document Request Parameters" and "Store Person Document Request Parameters" for additional details.

3. Create a Route Document Outbound Web Service, in which the Image Upload Source, if applicable, routes a document to the Imaging System's Pre-Archive Processing or Start Workflow Queue. The web service routes the document by sending the Imaging System's Document ID after invoking the Store Document Web Service. The Route Document Web Service leverages the Imaging System's Document ID returned in Store Document Web Service's response parameters. Please refer to the tables "Store Document Response Parameters" and "Route Document Request Parameters" for additional details.

Table 1 – Store Case/Confidential Case Document Request Parameters

Store Case/Confidential Case Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
name	Name	String	Unique value used by the imaging system to establish uniqueness of document.	Y
caseUID	Indexing Field 1	Long	Case UID.	Y
caseNumber	Indexing Field 2	String (7 Char.)	7- Character Case Number.	Y
caseName	Indexing Field 3	String (40 Char. Limit)	Case Name.	Y
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
drawerName	Drawer Name	String	<p>If the case is NOT confidential, append "Case" to the County Name of the authenticated user. Ex. "San Bernardino Case"</p> <p>If the case IS confidential, append "Confidential" to the County Name of the authenticated user.</p>	Y

			Ex. "San Bernardino Confidential"	
formName	Document Type	String (40 Char. Limit)	Imaging Form Name.	N
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	Date.	Y
documentType	Custom Property – Document Type	String (40 Char. Limit)	Imaging Document Type.	N
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
exceptionRouting	Custom Property – Exception Routing	String	Exception Routing.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a documents to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	Capture Information.	Y
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N

bundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user.	N
documentNotes	Custom Property- Document Notes	String	This field appends notes that include data attributes in and, if applicable, data attributes not present in the Request Parameters.	N

Table 2 – Store Person Document Request Parameters

Store Person Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
name	Name	String	Unique value used by the imaging system to establish uniqueness of document.	Y
personUID	Indexing Field 1	Long	Person UID.	Y
CIN	Indexing Field 2	String (40 Char. Limit)	Alpha-numeric Client Identification Number (CIN).	N
personName	Indexing Field 3	String (40 Char. Limit)	First and last name of person.	Y
barcodeNumber	Indexing Field 4	String	Barcode Number.	N
formNumber	Indexing Field 5	String	Form Number.	N
drawerName	Drawer Name	String	Static value: "Person".	Y
formName	Document Type	String	The Imaging Form Name.	N
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	Date.	Y
receivedDate	Custom Property –	Date (MM/DD/YYYY)	Date.	Y

	Received Date			
documentType	Custom Property – Document Type	String (40 Char. Limit)	Imaging Document Type.	N
countyCode	Custom Property – County Code	String (2 Char.)	2-digit County Code.	N
timeSensitive	Custom Property - Time Sensitive	Boolean	Time sensitive status of document in CalSAWS.	N
exceptionRouting	Custom Property – Exception Routing	String	Exception Routing.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a documents to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	Capture Information.	Y
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N
bundleID	Custom Property-Bundle ID	String	An identification field not modifiable by the end user.	N
documentNotes	Custom Property-Document Notes	String	This field appends notes that include data attributes in and, if applicable, data attributes not present in the Request Parameters.	N

Table 3 – Store Document Response Parameters

Store Document - RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
imageUID	Long	Imaging System's Document ID.	Y

Table 4 – Route Document Request Parameters

Route Document - REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED
imageUID	Long	Imaging System's Document ID.	Y

Table 5 – Store and Route Document - FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute was not supplied.
	errorMessage	"\${Field Name} Must Be Supplied."	

404	responseCode	404	Return HTTP response code 404 if the required data attribute cannot be found in the CalSAWS System.
	errorMessage	"\${Field Name} Not Found."	
422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute and the Integration Server is unable to process it.
	errorMessage	"\${Field Name} Is an Unprocessable Entity."	
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.1.3 Execution Frequency

The Store Document Web Service is invoked in the Image Upload Source when documents need to be stored in the CalSAWS Imaging System. If applicable, the Route Document Web Service is invoked in the Image Upload Source after invoking the Store Document Web Service.

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

CalSAWS Imaging System

2.1.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.2 CIV Kiosk: Store Document and Route Document Web Services

2.2.1 Overview

The CIV Kiosk will store both barcoded and nonbarcoded documents into either the Case or Confidential Case Drawer of the CalSAWS Imaging System via the Store Document Outbound Web Service.

After completing the Store Document Web Service, the CIV Kiosk will route documents to either the Pre-Archive Processing or Start Workflow Queue via the Route Document Outbound Web Service.

2.2.2 Description of Change

1. Update Hyland to include the value: "Kiosk-Other" as an Imaging-Exclusive Form Name.
2. Add the newly added entries in the document "CalSAWS Imaging Document Types and Form Names.xlsx" in the Static Table for the CalSAWS Imaging System Document Types and Short Names, DOC_TEMPL table and Code Category Table for the CalSAWS Imaging Type Codes as appropriate. Please refer to SCR CA-214060 for more clarifying information about the three tables.
3. When the Upload Source is the C-IV Kiosk and a barcoded document is being scanned into the Imaging System, heed to the following steps:
 - a. If the barcoded document is NOT associated to a confidential case, invoke the Store Document Outbound Web Service and send the Store Case Document Request Parameters, in which the CIV Kiosk sends Case, Barcode and Form Information to the Imaging System. Please refer to the table "CIV Kiosk: BARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
 - b. If the barcoded document IS associated to a confidential case, invoke the Store Document Web Service and send the Store Confidential Case Document Request Parameters, in which the CIV Kiosk sends Case, Barcode and Form Information to the Imaging System. Please refer to the table "CIV Kiosk: BARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
 - c. If the Store Document Web Service Request Parameters sends all required case, barcode and form information to the Imaging System, invoke the Route Document Web Service, which routes the document to the Pre-Archive Processing Queue in the Imaging System by sending the Imaging System's Document ID. If required fields are missing, route the document to the Start Workflow Queue in the Imaging System instead. The Route Document Web Service leverages the Imaging System's Document ID returned in Store Document Web Service's response parameter. Please refer to the tables "CIV Kiosk: Store Case Document Response Parameters" and "CIV Kiosk: Route Document Request Parameters" below for additional details.

4. When the Upload Source is the C-IV Kiosk and a nonbarcoded document is being scanned into the Imaging System, heed to the following steps:
 - a. If the nonbarcoded document is NOT associated to a confidential case, invoke the Store Document Outbound Web Service and send the Store Case Document Request Parameters to the Imaging System, in which the CIV Kiosk sends Case Data. Please refer to the table "CIV Kiosk: NONBARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
 - b. If the nonbarcoded document IS associated to a confidential case, invoke the Store Document Web Service and send the Store Confidential Case Document Request Parameters to the Imaging System, in which the CIV Kiosk sends Case Data. Please refer to the table "CIV Kiosk: NONBARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
 - c. Invoke the Route Document Web Service to route the document to the Start Workflow Queue in the Imaging System by sending Imaging System's Document ID. The Route Document Web Service leverages the Imaging System's Document ID returned in the Store Document Web Service's response parameter. Please refer to the tables "CIV Kiosk: Store Document Response Parameters" and "CIV Kiosk: Route Document Request Parameters" below for additional details.
5. Include data attributes from the request parameters and the customer-facing document type selection from the C-IV Kiosk in the Document Notes Field of the Store Document Web Service Request, as the worker may need to know these indexing values later in the Imaging Workflow. Please refer to the tables "CIV Kiosk: BARCODED- Store Case/Confidential Case Document Request Parameters" and "CIV Kiosk: NONBARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
6. Update the C-IV Kiosk application to no longer invoke the Mark Document Received and Generate Task Web Services. These web services will be called separately by the Imaging System, as addressed in greater detail in **SCR CA-214032 Mark Document Received Web Service** and **SCR CA-214034 Generate Task Web Service**.

Table 6 – CIV Kiosk: BARCODED- Store Case/Confidential Case Document Request Parameters

CIV Kiosk: Barcoded- Store Case/Confidential Case Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
name	Name	String	Unique value used by the imaging system to establish uniqueness of document.	Y

caseUID	Indexing Field 1	Long	Case Unique ID of authenticated user.	Y
caseNumber	Indexing Field 2	String (7 Char.)	7- character Case Number of authenticated user.	Y
caseName	Indexing Field 3	String (40 Char. Limit)	The Case Name of authenticated user. Truncate the Case Name to 40 characters.	Y
barcodeNumber	Indexing Field 4	String	Barcode value present on system- generated barcoded documents and represents the 2D barcode UID.	Y
formNumber	Indexing Field 5	String (40 Char. Limit)	The Form Number of the DOC_TEMPL record associated with the 2D barcode number from the GENERATE_DOC table provided in the request.	Y
drawerName	Drawer Name	String	If the case is NOT confidential, append "Case" to the County Name of the authenticated user. Ex. "San Bernardino Case" If the case IS confidential,	Y

			append "Confidential" to the County Name of the authenticated user. Ex. "San Bernardino Confidential"	
formName	Document Type	String (40 Char. Limit)	This element will be found in the new 'Imaging Form Name' column in DOC_TEMPL.	Y
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	CalSAWS System Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	CalSAWS System Date.	Y
documentType	Custom Property – Document Type	String (40 Char. Limit)	For CalSAWS system- generated documents, Document Type is listed in the CalSAWS Imaging Type Code Category table, which is associated to the IMG_TYPE column in the DOC_TEMPL table.	Y
countyCode	Custom Property – County Code	String (2 Char.)	The 2-digit County Code of the authenticated user.	Y
timeSensitive	Custom Property -	Boolean	Time sensitive status of	Y

	Time Sensitive		document in CalSAWS. Documents that are time sensitive are listed in CT 329.	
exceptionRouting	Custom Property – Exception Routing	String	Exception Routing.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a documents to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	2-digit County Code + “Kiosk” + Office Name. The Office Name from the Office Table associated to the Office ID. Ex. 36 Kiosk Main Office	Y
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N
bundleID	Custom Property- Bundle ID	String	An identification field not modifiable by the end user.	N
documentNotes	Custom Property-	String	This field appends notes	Y

	Document Notes		<p>that include data attributes from the Request Parameters and additionally, a data attribute of the document type that the customer selected in the C-IV Kiosk.</p> <p>This data type will be a string. Within the string, there will be line break delimiters at the end of each key-value pair. There will be colon delimiters to separate each key from its value. The key will be the data attribute field name and the value will be its unique value.</p>	
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Table 7 – CIV Kiosk: NONBARCODED- Store Case/Confidential Case Document Request Parameters

CIV Kiosk: Nonbarcoded- Store Case/Confidential Case Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
name	Name	String	Unique value used by the imaging system to establish uniqueness of document.	Y

caseUID	Indexing Field 1	Long	Case Unique ID of authenticated user.	Y
caseNumber	Indexing Field 2	String (7 Char.)	7- Character Case Number of authenticated user.	Y
caseName	Indexing Field 3	String (40 Char. Limit)	The Case Name of authenticated user. Truncate the Case Name to 40 characters.	Y
barcodeNumber	Indexing Field 4	String	N/A	N
formNumber	Indexing Field 5	String (40 Char. Limit)	Send value, "IMG 656".	Y
drawerName	Drawer Name	String	If the case is NOT confidential, append "Case" to the County Name of the authenticated user. Ex. "San Bernardino Case" If the case IS confidential, append "Confidential" to the County Name of the authenticated user. Ex. "San Bernardino Confidential"	Y
formName	Document Type	String (40 Char. Limit)	Send value, "Kiosk-Other".	Y
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	System Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	System Date.	Y
documentType	Custom Property –	String (40 Char. Limit)	N/A	N

	Document Type			
countyCode	Custom Property – County Code	String (2 Char.)	The 2-digit County Code of the authenticated user.	Y
timeSensitive	Custom Property - Time Sensitive	Boolean	N/A	N
exceptionRouting	Custom Property – Exception Routing	String	Exception Routing.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a documents to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	2-digit County Code + "Kiosk" + Office Name. The Office Name from the Office Table associated to the Office ID. Ex. 36 Kiosk Main Office	Y
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N
bundleID	Custom Property-Bundle ID	String	An identification field not modifiable by the end user.	N

documentNotes	Custom Property – Investigations ID	String	<p>This field appends notes that include data attributes from the Request Parameters and additionally, a data attribute of the document type that the customer selected in the C-IV Kiosk.</p> <p>This data type will be a string. Within the string, there will be line break delimiters at the end of each key-value pair. There will be colon delimiters to separate each key from its value. The key will be the data attribute field name and the value will be its unique value.</p>	Y
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Table 8 – CIV Kiosk: Store Document Response Parameters

CIV Kiosk: Store Document - RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
imageUID	Long	Imaging System's Document ID.	Y

Table 9 – CIV Kiosk: Route Document Request Parameters

CIV Kiosk: Nonbarcoded- Route Document - REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED

imageUID	Long	Imaging System's Document ID.	Y
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2.2.3 Execution Frequency

The Store Document Web Service is invoked real-time when documents have been submitted by a customer via the CIV Kiosk. The Route Document Web Service is invoked real-time in the CIV Kiosk after invoking the Store Document Web Service.

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Data Volume/Performance

N/A

2.2.7 Interface Partner

CalSAWS Imaging System

2.2.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.3 LRS Lobby Check-In Application: Store and Route Document Web Services

2.3.1 Overview

The LRS Lobby Check-In Application will store only nonbarcoded documents into either the Case or Confidential Case Drawer of the CalSAWS Imaging System via the Store Document Outbound Web Service.

After completing the Store Document Web Service, the LRS Lobby Check-In Application will route documents to the Start Workflow Queue of the CalSAWS Imaging System via the Route Document Outbound Web Service.

2.3.2 Description of Change

1. Update Hyland to include the value: "Lobby-Other" as an Imaging-Exclusive Form Name.
2. Update the LRS Lobby Check-In App to retrieve case confidentiality when the worker checks in. Return a "True" value if one or more CONFID records are effective for the current system date. Return a "False" value if a currently effective CONFID record does not exist.
3. When a nonbarcoded document is being scanned in the LRS Lobby Check-In App and is NOT associated to a confidential case, heed to the following step:
 - a. Invoke the Store Document Web Service and send the Store Case Document Request Parameters, in which the LRS Lobby Check-In App sends Case Information to the Imaging System. Please refer to the table "LRS Lobby Check-In App: NONBARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
4. When a nonbarcoded document is being scanned in the LRS Check-In App and IS associated to a confidential case, heed to the following step:
 - a. Invoke the Store Document Web Service and send the Store Confidential Case Document Request Parameters, in which the LRS Lobby Check-In App sends Case Information to the Imaging System. Please refer to the table "LRS Lobby Check-In App: NONBARCODED- Store Case/Confidential Case Document Request Parameters" below for additional details.
5. Include existing data attributes from the request parameters and additionally, the Person Data and customer-facing document type selection from the LRS Lobby Check-In App, in the Document Notes Field of the Store Document Web Service Request, as the worker may need to know the original and case indexing values later in the Imaging Workflow.
6. Invoke the Route Document Web Service, in which the LRS Lobby Check-In App routes the document to the Start Workflow Queue in the Imaging System by sending the Imaging System's Document ID. The Route Document Web Service leverages the Imaging System's Document ID returned in the Store Document Web Service's response parameter. Refer to the tables "LRS Lobby Check-In App: Store Document Response Parameters" and "LRS

Lobby Check-In App: Route Document Request Parameters" below for additional details.

7. Update the LRS Lobby Check-In App to no longer invoke the Generate Task Web Service. Task generation will be triggered in the Imaging System, as addressed in greater detail in **SCR CA-214034 Generate Task Web Service**.

Table 11 – LRS Lobby Check-In App: NONBARCODED- Store Case/Case Confidential Document Request Parameters

LRS Lobby Check-In App: Nonbarcoded- Store Case Confidential Document - REQUEST				
CALSAWS FIELD NAME	IMAGING VALUE NAME	TYPE	COMMENTS	REQUIRED
name	Name	String	Unique value used by the imaging system to establish the uniqueness of document.	Y
caseUID	Indexing Field 1	Long	Case Unique ID of authenticated user.	Y
caseNumber	Indexing Field 2	String (40 Char. Limit)	7-character Case Number of authenticated user.	Y
caseName	Indexing Field 3	String (40 Char. Limit)	The Case Name of authenticated user. Truncate the Case Name to 40 characters.	Y
barcodeNumber	Indexing Field 4	String	N/A	N
formNumber	Indexing Field 5	String	Send value, "IMG 655".	Y
drawerName	Drawer Name	String	If the case is NOT confidential, append "Case" to the County Name of the Authenticated User. Ex. "Los Angeles Confidential" Append	Y

			If the case IS confidential, append "Confidential" to the County Name of the authenticated user. Ex. "Los Angeles Confidential"	
formName	Document Type	String (40 Char. Limit)	Send value, "Lobby-Other".	Y
applicableDate	Custom Property – Applicable Date	Date (MM/DD/YYYY)	System Date.	Y
receivedDate	Custom Property – Received Date	Date (MM/DD/YYYY)	System Date.	Y
documentType	Custom Property – Document Type	String (40 Char. Limit)	N/A	N
countyCode	Custom Property – County Code	String (2 Char.)	The 2-digit County Code of the authenticated user.	Y
timeSensitive	Custom Property - Time Sensitive	Boolean	N/A	N
exceptionRouting	Custom Property – Exception Routing	String	Exception Routing.	N
applicationNumber	Custom Property – E-Application Number	String	The Electronic Application Number that links a documents to its appropriate case information.	N
captureInformation	Custom Property – Capture Information	String (256 Char. Limit)	2-digit County Code + "Lobby Check-In" + Office Name.	Y

			<p>The Office Name from the Office Table associated to the Office ID.</p> <p>Ex. 19 Lobby Check-In Main office</p>	
hearingsNumber	Custom Property – Hearings Number	String (40 Char. Limit)	Hearings Number.	N
investigationsID	Custom Property – Investigations ID	String (40 Char. Limit)	Investigations ID.	N
bundleID	Custom Property-Bundle ID	String	An identification field not modifiable by the end user.	N
Document Notes		String	<p>This field appends notes that include data attributes from the Request Parameters and additionally, the Person Name and if available, CIN of the person associated to the document. Also, include a data attribute of the document type that the customer selected in the LRS Check-In App.</p> <p>This data type will be a string. Within the string, there will be line break delimiters at the end of each key-</p>	Y

			value pair. There will be colon delimiters to separate each key from its value. The key will be the data attribute field name and the value will be its unique value.	
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Table 12 – LRS Lobby Check-In App: Store Document Response Parameters

LRS Lobby Check-In App: Nonbarcoded- Store Document - RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
imageUID	Long	Imaging System's Document ID.	Y

Table 13 – LRS Lobby Check-In App: Route Document Request Parameters

LRS Lobby Check-In App: Nonbarcoded- Route Document - REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED
imageUID	Long	Imaging System's Document ID.	Y

2.3.3 Execution Frequency

The Store Document Web Service is invoked real-time when documents have been submitted by a customer from the LRS Lobby Check-In Application. The Route Document Web Service is invoked real-time in the LRS Lobby Check-In Application after invoking the Store Document Web Service.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

CalSAWS Imaging System

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

DRAFT

3 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

DRAFT

3.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2192	<p>The CONTRACTOR shall import the customer submitted images/documents from the following sources into the imaging solution:</p> <p>1) Mobile App Upload - Customer uploads a image/document to their case or e-applications with their mobile device using the CalSAWS mobile app. Documents to be viewable near real time</p> <p>2) Statewide Portal - Customer uploads an image/document to their case or e-application through the portal. Documents to be viewable near real time</p> <p>3) C-IV Self-Service Kiosk - Customer uploads an image/document to their case at a self-service kiosk. Document upload will follow the existing ingestion model.</p>	None	<ol style="list-style-type: none"> 1. This design creates a Store Document Outbound Web Service to store case, confidential case or person-level documents in the CalSAWS Imaging System. It additionally creates three different request parameters for the Store Document Outbound Web Service to send the document to its appropriate Case, Confidential Case or Person Drawer in the Imaging System: Store Case Document Request, Store Confidential Case Document Request and Store Person Document Request. 2. This design creates a Route Document Outbound Web Service to route documents to the CalSAWS Imaging System's Pre-Archive Processing or Start Workflow Queue after invoking the Store Document Web Service. 3. This design updates the C-IV Kiosk Application to upload documents to the new CalSAWS Imaging System. 4. This design updates the LRS Lobby Check-In Application to upload documents to the new CalSAWS Imaging System.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2513	The CONTRACTOR shall configure the imaging solution to update the document metadata on documents associated to an e-application. The e-application number received from the self-service portal and mobile app will be stored as an additional metadata field.		In this SCR, the "Store Document" Webservice is configured to send an e-application metadata field. This webservice will be made available to the self-service and mobile app systems.

DRAFT

4 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	Imaging	CalSAWS Imaging Document Types and Form Names	CalSAWS Imaging Document Types and Form Names.xlsx

DRAFT

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

DRAFT

6 OUTREACH

[Include any specific outreach that needs to occur with implementation i.e. a CIT, a special webcast or onsite demonstration, any lists, etc...]

DRAFT

7 APPENDIX

[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc....]

DRAFT



California Statewide Automated Welfare System

Design Document

CA-214038

Add Images Buttons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sarah Steimle
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/6/2020	1.0	First Review	Sarah Steimle
9/14/2020	2.0	Updated Security Rights and Security Group name from	

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1 OVERVIEW

This SCR will be adding Images buttons to the specified pages in the LRS/CalSAWS system in order to pull back documents that are specific to the page and case the worker is on. This SCR will also be updating the Point of Service Images list to be migrated into the Imaging Solution. This SCR will update the Utility Navigation bar Images button to display a pop-up from Hyland that will land the user on the Hyland Home page to begin the Imaging Workflow and will remove the DCFS Images button.

1.1 Current Design

Currently, there are limited Images buttons in the LRS/CalSAWS system. Currently, the Point of Service Images List page displays the Images received for the case the worker is on. Currently, the Utility Navigation Images button displays the Images associated to the case and the DCFS Images button gives the user access to DCFS images.

1.2 Requests

The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system. The following request is to migrate the Point of Service Images List page to the Imaging Solution (Hyland). The Next request is for this SCR is to update the utility Navigation Images button to have a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland Home page to begin the Imaging Workflow and to remove the DCFS images button.

1.3 Overview of Recommendations

1. The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system.
2. The request is to migrate the Point of Service Images List page into Hyland.
3. The request is to update the Utility Navigation Images button to display a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland page to begin the Imaging Workflow when clicked.
4. The request is to remove the DCFS images button from the Utility Navigation bar.

1.4 Assumptions

1. The predefined Imaging filters that these pages depend on will be implemented on the same release.
2. Fields not mentioned in the Description of Changes sections, will not be updated.
3. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).

- The Hyland mockups are currently in draft and minor updates may be required.

2 RECOMMENDATIONS

2.1 Add Images Buttons

2.1.1 Overview

Currently, in LRS/CalSAWS there are limited Images buttons. This SCR will implement Images button on the specified pages found in Supporting Document #1. The following are some examples.

2.1.2 Example Mockups

Absent/Unmarried Parent List

*- Indicates required fields

ImagesContinue

Root Questions

	Name	SSN	DOB	Address	
<input type="checkbox"/>	BUCKINGHAM, CORY 45M	006-06-4071	05/21/1975		Edit View History
<input type="checkbox"/>	REINARD, CORY 45M	006-06-4071	05/21/1975		Edit View History

Remove

Applicant Name: *Add

☐ Complete

Continue

Figure 2.1.1 – Absent/Unmarried Parent List

Expense Detail

*- Indicates required fields

Images Edit Close

Expense Category: *
Dependent Care

Expense Type: *
Dependent Care

Dependent: *
MCNAMARA, KIMI 18F

Name of Provider: *
John Smith

Address of Provider: *
998 timberland

City: *
sacramento

State: *
CA

ZIP Code: *
95691

Frequency: *
Monthly

Shared with RDP

Display From: To: View

Contributors

Persons	Begin Date	End Date
MCNAMARA, TOMAS 46F	04/30/2020	

Amounts

Amount	Amount Paid by Others	Begin Date	End Date
No Data Found			

Edit Close

Last Updated On 04/28/2020 1:45:38 PM By: 987575

Figure 2.1.2 – Expense Detail

School Attendance List

Images

Root Questions

Search Results Summary Results 1 - 2 of 2

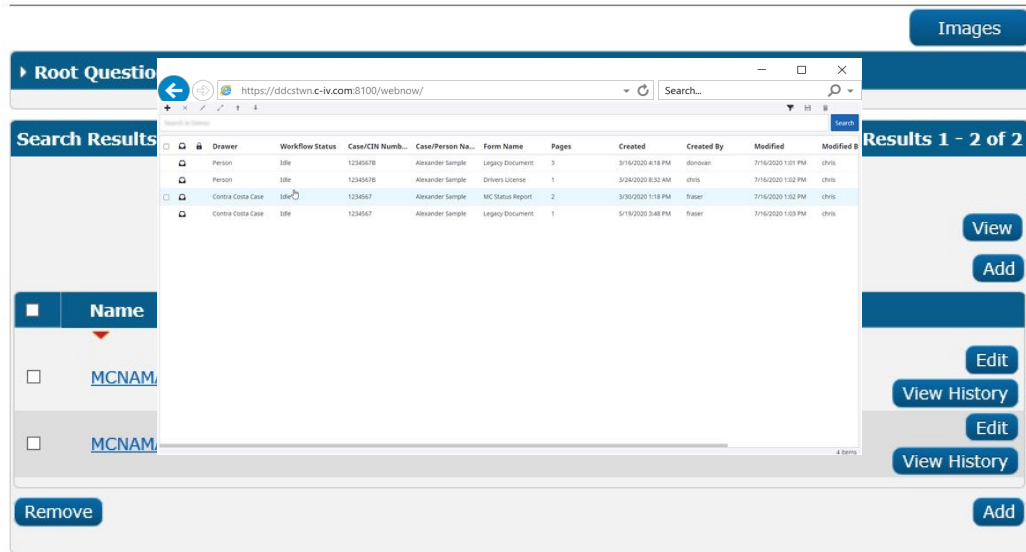
Display From: To: View Add

Name	Name of School	Begin Date	End Date
<input type="checkbox"/> MCNAMARA, KIMI 18F	TERRENCE A	07/23/2013	
<input type="checkbox"/> MCNAMARA, KRISTINE 19F	MAYNARD	07/23/2013	

Remove Add

Figure 2.1.3 – School Attendance List

School Attendance List



imag

Figure 2.1.4 – Hyland Pop Up Mockup

2.1.3 Description of Changes

1. Images – When clicked the Images button will search for the specified criteria in the Specific Search Criteria excel spreadsheet (Supporting Document #1) and will display a pop up from the Imaging Solution (Hyland) that is 850 pixels tall and 1500 pixels wide. The “Images” button will go to the left of any other buttons that are already on the pages directly below the page title (For build reference, in the top Button Container). Pages in LRS that already have an Images button or “View Images” button will be updated to “Images” and will utilize the specific search criteria and defined parameters to create the URL to Hyland. The Specific Search Criteria lists: LRS Page, Imaging Document View, Level of Document Retrieved, Security, CalSAWS Doc Types, and CalSAWS Form Names(Tab1 is for pages that do not have a button in LRS/CalSAWS already and tab 2 is for LRS/CalSAWS pages that already have an Images button on the page).
 - a. The column “LRS Page” is the column that lists the pages in LRS/CalSAWS that need an Images button added to it.
 - b. The “Level of Document Retrieved” lists the level of document retrieval associated to the page.
 - c. The column “Security” lists the security right the user needs to be able to see the “Images” button on the page.
 - d. The column “CalSAWS Doc Types” lists the document types that need to be searched for when the Images button is clicked on the associated page.

- e. The “CalSAWS Form Names” lists the “Form Names” that need to be searched for when the Images button is clicked on the associated page.

The parameters that must be sent to Hyland for Person level Document Retrieval is:

- a. All Person(s) UID
- b. View ID
- c. Filter ID (Filter ID is created by Imaging team)

The parameters that must be sent to Hyland for Case Level Document Retrieval are:

- a. Case UID
- b. View ID
- c. Filter ID (Filter ID is created by Imaging team)

The parameters that must be sent to Hyland when the document retrieval is either “Case or Person” level documents are:

- a. Case UID
- b. All Persons UID
- c. Filter ID (Filter ID is created by Imaging team)
- d. View ID

The parameters that must be sent to Hyland when the document retrieval is “Resource” are:

- a. Filter ID
- b. View ID
- c. Org ID

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). Additionally, no documents past 365 days old and no more than 500 documents will be listed in the Hyland pop-up.

2.1.4 Page Location

- NA

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchPerson	Allows the worker to see person level documents.	Imaging Search Person

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows the worker to see Case level documents.	Imaging Search Case

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Person	Allows the worker to see person level documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor
Imaging Search Case	Allows the worker to see Case level documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.1.6 Page Mapping

NA

2.1.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.2 Update Point of Service Images List Page

2.2.1 Overview

Currently, in LRS/CalSAWS the Point of Service task navigation item directs the user to the Point of Service page where images that have been received for the case the worker is on are listed.

2.2.2 Example Mockups

The mockup displays a sidebar navigation menu on the left with the 'Case Summary' button highlighted. The main content area is titled 'Case Summary' and includes a search bar, a 'Companion Cases' section, a 'Display' filter, and a table of people associated with the case.

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
KIMI MCNAMARA	04/04/2002	18	F	843-95-4627	101338414	03	In the Home
KRISTINE MCNAMARA	11/01/2000	19	F	363-22-9412	459993203	04	In the Home
TOMAS MCNAMARA	06/20/1973	47	F	582-97-1705	659192495	02	In the Home
WINDY MCNAMARA	08/18/1968	51	M	969-60-8017	689204248	01	In the Home

Figure 2.1.1 – Point of Service Images Task Navigation Button (Bottom Left)

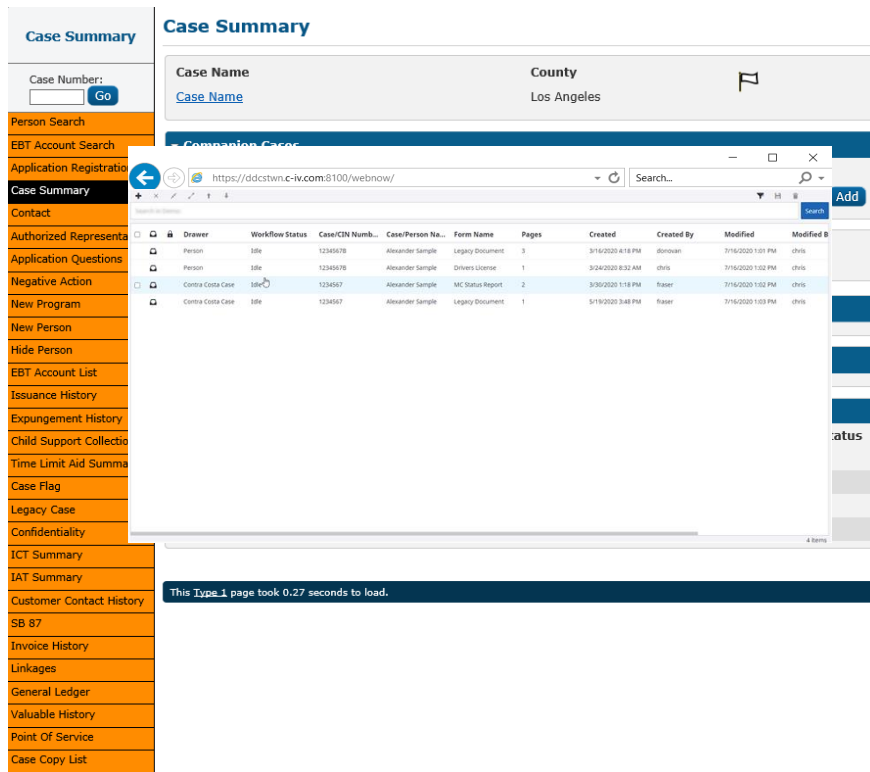


Figure 2.1.2 – Hyland Pop up Mockup

2.2.3 Description of Changes

1. “Point of Service” Task button – When clicked, this button will display a pop up from the imaging solution (Hyland). This pop up will give the user the ability to see point of service images listed which includes Kiosk/lobby, mobile app, and the statewide portal. The date range to search for the images when this button is clicked is 90 days previous to the current day. These documents will be filtered by Lobby and Kiosk source values and will search for all document types. The user must have either ImagingSearchPerson or ImagingSearchCase security rights in order to see the Point of Service Task nav item.

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.

2.2.4 Page Location

- **Global – Case Info**

- **Local – Case Summary**
- **Task – Point of Service**

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows the worker to see Case level documents.	Imaging Search Case
ImagingSearchPerson	Allows the worker to see Person level documents	Imaging Search Person

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Case	Allows the worker to see Case level documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor
Imaging Search Person	Allows the worker to see person level documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor,

Security Group	Group Description	Group to Role Mapping
		RDB Supervisor, Special Investigations Supervisor

2.2.6 Page Mapping

Update Page Mapping for the Case Summary page.

2.2.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.3 Update Utility Navigation Images Buttons

2.3.1 Overview

Currently, in LRS/CalSAWS the Utility Navigation Images Button displays the images associated to the case the user is on. Currently the DCFS Images button displays DCFS Images.

2.3.2 Example Mockups

Case Name: Case Name

Case Number: L001318

Journal

Help

Resources

Page Mapping

Imaging

Log Out

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Case Summary

Case Name

County

Case Name

Los Angeles

Companion Cases

Case Number

Case Name

Add

Display:

09/01/2020

View

Case Flags

Medi-Cal

All People Associated with the Case

Name	DOB	Age	Gender	SSN	CIN	Person #	Household Status
KIMI MCNAMARA	04/04/2002	18	F	843-95-4627	81544235E	03	In the Home
KRISTINE MCNAMARA	11/01/2000	19	F	363-22-9412	39084235E	04	In the Home
TOMAS MCNAMARA	06/20/1973	47	F	582-97-1705	41029748E	02	In the Home
WINDY MCNAMARA	08/18/1968	51	M	969-60-8017	15925409E	01	In the Home

Figure 2.1.1 – Utility Navigation Images Buttons Updated

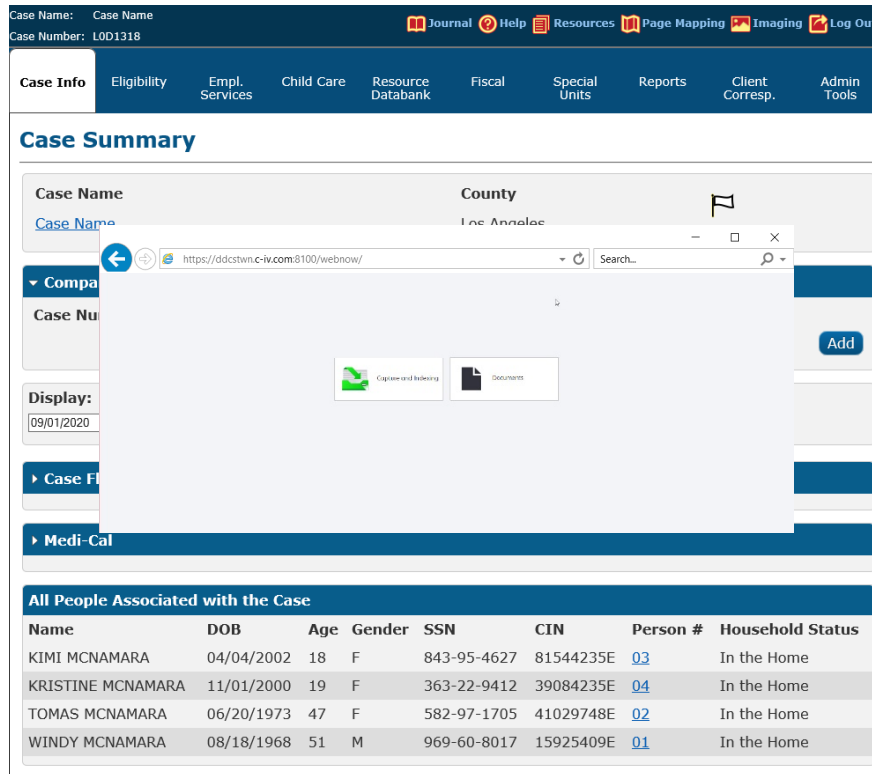


Figure 2.1.2 – Utility Navigation Images Button Hyland pop up (When “Imaging” is clicked)

2.3.3 Description of Changes

1. Utility Navigation Imaging Button – When clicked this button will display the Perceptive Experience Home Page from the Imaging Solution (Hyland) at all times. The date range of this search is 365 days and the maximum amount of documents that can be listed is 500. The Security right the user needs to have in order to be able to view this button is “ImagingSearchCase”.

2. DCFS Images – This button will be removed from the LRS/CalSAWS system per request.

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland).

2.3.4 Page Location

- **Global – NA**
- **Local - NA**
- **Task - NA**

2.3.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows the worker to see Case level documents.	Image Search Case

1. Security Groups

Security Group	Group Description	Group to Role Mapping
Image Search Case	Allows the worker to see Case level documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.3.6 Page Mapping

Update Page Mapping for the Utility Navigation Images button.

2.3.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	This document specifies what pages need an "Images" button added to it, the Document View, the Level of Document Retrieval, the security, the CalSAWS Doc Types, and the CalSAWS Form Names.	Specific Search Criteria
2	Security	Security Matrix	Security Matrix
3	Online	Folder that contains mockups of all pages that need to be updated.	Mockup Folder

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2508	The CONTRACTOR shall add all images buttons from the LRS and C-IV Application pages to the CalSAWS Software. The images buttons will display the same images/documents that are currently returned from the LRS and C-IV Applications.	Please refer to Exhibit Z, schedule 1 for contractor assumptions.	Adding all images buttons to the system.



California Statewide Automated Welfare System

Design Document

CA-214892

DDID 1439

Task Mgt – Error Prone and High Risk
Administration Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas
	Reviewed By	Justin Dobbs

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/31/2020	1.0	Initial Revision	Mayuri Srinivas

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1 OVERVIEW

This design outlines modifications to the Error Prone and High Risk administrative function in the LRS/CalSAWS System to be 58 county friendly and allow counties to configure automated Tasks.

1.1 Current Design

The LRS/CalSAWS System contains an Error Prone and High Risk Administration page that allows county users to activate or deactivate batch processing that identifies specific Error Prone and High Risk case scenarios and associates appropriate Case Flags to the impacted cases. This administrative page is not currently programmed to support configuration by more than one county. County users may also associate Error Prone and High Risk Case Flags to Cases manually. This administration page is simply labeled "Administration". This design document will refer to this page as the "Error Prone and High Risk Administration page".

1.2 Requests

Update the Error Prone and High Risk Administration page to be configurable by each individual LRS/CalSAWS county. Also modify the LRS/CalSAWS System to offer a county configurable Automated Action that can create a Task when an Error Prone or High Risk Case Flag is associated to a Case manually or through batch processing.

1.3 Overview of Recommendations

1. Update the Error Prone and High Risk Administration page to be configurable for each LRS/CalSAWS county.
2. Add a configurable Automated Action that will create a Task when an Error Prone or High Risk Case Flag is associated to a Case manually or through batch processing.

1.4 Assumptions

1. The second question "(Out-of-County/State and Grandfather (GF) rates over \$0.00 (FC, KinGAP, AAP))" on the Error Prone and High Risk Administration page does not have any associated automation.
2. Information currently available on the Error Prone and High Risk Administration page will not be impacted for Los Angeles county with this enhancement.

2 RECOMMENDATIONS

This section will outline recommendations needed to update the Error Prone and High Risk Administration page to be configurable by 58 counties and introduce an Automated Action to create a related Task.

2.1 Error Prone and High Risk Case Flag Administration page

2.1.1 Overview

The Error Prone and High Risk Administration page layout and functionality is not being modified. This page is being configured to be customizable for each individual LRS/CalSAWS county.

2.1.2 Error Prone and High Risk Administration page – Reference Example

Administration

*- Indicates required fields

Error Prone:

☐ On ☒ Off Participant's rent exceeds % of known income(CF)

☐ On ☒ Off Out-of-County/State and Grandfather (GF) rates over \$ (FC, KinGAP, AAP)

High Risk:

☐ On ☒ Off Correspondence mailed to address other than the residence address (CW, GR)

☐ On ☒ Off Convicted welfare fraud cases (CW,GR)

☐ On ☒ Off Person known to multiple cases (MED,GR,CF,FC,KinGAP,AAP)

Save Cancel

Save Cancel

Figure 2.1.2.1 – Error Prone and High Risk Administration page Reference Example

2.1.3 Description of Changes

1. Configure the Error Prone and High Risk Administration page to be configurable for each individual LRS/CalSAWS County. All five fields on the page will initially be set to "Off" for the 57 migration counties. Current selections for Los Angeles county will not be affected. This recommendation does not modify the cosmetics of the page, it is strictly a configuration behind the scenes.

2.1.4 Page Location

- **Global:** Special Units
- **Local:** Error Prone

- **Task:** Administration

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Automated Action Detail Page

2.2.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This section will outline the specifics of the Automated Action that will allow counties to enable and configure attributes for a task that will be logged when an Error Prone or High Risk Case Flag is added to a Case.

2.2.2 Automated Action Detail Page Mockup

Automated Action Detail

EditClose

Action Information

Name:
Case Flag Added: Error Prone and High Risk

Type:
Create Task

Status: *
Inactive

Program(s):
AA, AS, CP, FT, FS, CW, CC, CS, DC, DV, FC, GA, HP, HT, IH, IV, KG, MC, NB, PE, RC

Run Date:
Daily (Monday-Saturday) or Real Time

Source:
Batch/Online

Scenario:
An Error Prone and High Risk Case Flag has been added to the case.

Task Information

Task Type: *

Due Date:
Default Due Date

Default Due Date:
30 Days

Initial Assignment:
Default Assignment

Default Assignment:
Current Program Worker

Long Description:
An Error Prone and High Risk Case Flag has been added to the case. Please take appropriate action.

EditClose

Figure 2.2.2.1 – Automated Action Detail Page Mockup

2.2.3 Description of Changes

1. Introduce the following Automated Action that will be triggered when an Error Prone or High Risk Case Flag is associated to a Case manually or through batch processing. This Automated Action will be configured for each of the 58 counties with an initial status of 'Inactive'.

The Automated Action Status will initially be Inactive with a blank Task Type and Task Sub-Type. This is because each county can set a custom Task Type for each Automated Action. If a county decides to Activate the Automated Action, the page validation will require that the county also select a Task Type to be used. Reference DDID 34 (CA-214928) for specifics of the Task Type pages.

a. Action Information

- i. Name: Case Flag Added: Error Prone and High Risk
- ii. Type: Create Task
- iii. Status: Inactive
- iv. Program(s): AA, AS, CP, FT, FS, CW, CC, CS, DC, DV, FC, GA, HP, HT, IH, IV, KG, MC, NB, PE, RC
- v. Run Date: Daily (Monday-Saturday) or Real Time
- vi. Source: Batch/Online
- vii. Scenario: An Error Prone and High Risk Case Flag has been added to the case.

b. Task Information

- i. Task Type: BLANK
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 30 Days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Long Description: An Error Prone and High Risk Case Flag has been added to the case. Please take appropriate action.

Note: The Automated Action will only create a Task if the county has updated the Automated Action to be Active.

2. Update the LRS/CalSAWS System to trigger the Automated Action in Recommendation 2.2.3.1 any time an Error Prone or High Risk Case Flag is added to a case manually through the Case Flag Detail page.

2.2.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Error Prone and High Risk Case Flag Batch Processes

2.3.1 Overview

The following batch processes evaluate information on the Error Prone and High Risk Administration page to determine Cases that an Error Prone or High Risk Case flag will be associated to:

- a. PB19S932: Associates the "Error Prone - Rent Over TMHI" Case Flag.
- b. PB19S933: Associates the "High Risk - Convicted Fraud" Case Flag.
- c. PB19S931: Associates the "High Risk - Multiple Cases" Case Flag.
- d. PB19S903: Associates the "High Risk - Correspondence Mismatch" Case Flag.

2.3.2 Description of Change

1. Update the following batch processes to evaluate information for all LRS/CalSAWS counties. This modification will also include an adjustment to evaluate for the county specific configuration information on the Error Prone and High Risk Administration page.
 - a. PB19S932: Associates the "Error Prone - Rent Over TMHI" Case Flag.
 - b. PB19S933: Associates the "High Risk - Convicted Fraud" Case Flag.
 - c. PB19S931: Associates the "High Risk - Multiple Cases" Case Flag.
 - d. PB19S903: Associates the "High Risk - Correspondence Mismatch" Case Flag.

Technical: The "19" referenced in the batch process names above can be replaced by "00" to signify that the batch process applies to all counties.

2. Update the batch processes in Recommendation 2.3.2.1 to also trigger the Automated Action described in Recommendation 2.2.3.1 when an Error Prone and High Risk Case Flag is associated to a Case.

2.3.3 Execution Frequency

The batch processes mention above all run daily. The batch frequency will not be modified.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

All LRS/CalSAWS System counties are impacted.

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1439	The CONTRACTOR shall update the Error Prone and High Risk Case Flag Administration page, and supporting batch processing, to be configurable by each CONSORTIUM County. The CONTRACTOR shall add a new configurable automated task to generate when an Error Prone or High Risk flag is added to a case.	None	This design will update the Error Prone and High Risk Case Flag Administration page and batch processing to function for all LRS/CalSAWS counties. The design will also include a configurable Automated action to create a Task when an Error Prone or High Risk case flag is added to a case.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A



California Statewide Automated Welfare System

Design Document

CA-215103 | DDID 2634

FDS: Non-State Forms - Update GEN 1390

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harish Katragadda
	Reviewed By	Suresh Naidu Mullaguri

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2020	1.0	Original	Harish Katragadda

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1 OVERVIEW

The purpose of this change is to update GEN 1390 (03/17) in English and add Spanish version to LRS/CalSAWS Template Repository and make this form available for all 58 counties.

1.1 Current Design

An older version for GEN 1390 exists in English in LRS/CalSAWS in the Template Repository.

1.2 Requests

1. Update GEN 1390 in English with the latest version of the form.
2. Add the GEN 1390 (03/17) version of the form to the LRS/CalSAWS Template Repository in Spanish.

1.3 Overview of Recommendations

1. Add and Update GEN 1390 (03/17) form to LRS/CalSAWS Template Repository for all 58 counties.

1.4 Assumptions

1. GEN 1390 will be available to all 58 counties.
2. The Current Form field population will remain the same except for the fields that are updated in the design.
3. All Fields on the form are editable unless specified.

2 RECOMMENDATIONS

2.1 GEN 1390 – Informing Notice-Regarding an Action Taken on Your Case

2.1.1 Overview

This section will cover the updates needed to Add and Update GEN 1390 (03/17) Form to LRS/CalSAWS Template Repository.

State Form: GEN 1390

Programs: CalWORKs, CalFresh, General Assistance/General Relief

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.1.2 Description of Change

1. Update Existing English GEN 1390 form with the updated State Version:
 - a. Update the Header Formatting.
 - b. Update 'By Telephone' to 'By telephone'.
 - c. Update Form Version at the bottom of the form to (03/17).

Form Mockup/Example: See Supporting Document #1

2. Add GEN 1390 (03/17) in Spanish to Template Repository.

Create GEN 1390 Form XDP with 1 impression in Spanish. First Impression will be GEN 1390 form.

Form Header: N/A

Form Title: Informing Notice-Regarding an Action Taken on Your Case

Template Description: User generates the form GEN 1390 from the Repository and attaches it to the adverse action NOAs for programs CalWORKs, General Relief and CalFresh impacted by the income obtained from The Work Number Express Service.

Form Number: GEN 1390

Include NA Back 9: No

Form Mockup/Example: See Supporting Document #2

3. Add the GEN 1390 (03/17) Informing Notice-Regarding an Action Taken on Your Case Form to Template Repository. The following parameters will be required:

Required Form Input: Case Number, Customer Name, Program, and Language.

4. Add the following barcode options to the GEN 1390 (03/17) Form:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	N

5. Add the following print options to the GEN 1390 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	N	Y	N

Mailing Requirements:

Mail-To (Recipient): N/A

Mailed From (Return): N/A

Mail-back-to Address: N/A

Outgoing Envelope Type: N/A

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: N/A

Electronic Signature: N/A

Post to YBN/C4Y: N/A

Clock Indicator: N/A

6. Variable Population for GEN 1390 Form from Template Repository

Populate the variables on the GEN 1390

Name of NOA, Etc., Used	
<p><i>"The action being taken against you is based in part from information obtained from the Consumer Credit report Agency listed below. This Agency did not make the decision to take this action against you and is not able to explain why the decision was made. You can obtain a free copy of information contained in your file if you make a request to the Agency within 60 days. You may dispute the accuracy or completeness of any information by contacting the Agency."</i></p>	
The information to make this change to your case was provided by:	<div>Name of Agency Providing Notice</div>
How can you obtain a copy of your employment verification report?	<div>By telephone: 1-800-367-2884</div> <div>Toll-Free Number</div> <div>By mail: The Work Number/Equifax 11432 Lackland Road St. Louis, MO 63146</div> <div>Address</div> <div>On the web: www.theworknumber.com</div> <div>Website Address</div>
What if there are mistakes	You have a right to dispute any inaccurate information in your consumer credit report

Section	Field	Description
GEN 1390 - Page 1	By telephone:	1-800-367-2884
GEN 1390 - Page 1	By mail:	The Work Number/Equifax 11432 Lackland Road St. Louis, MO 63146

Section	Field	Description
GEN 1390 - Page 1	On the web:	www.theworknumber.com

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	GEN 1390 English	GEN1390_EN.pdf
2	Correspondence	GEN 1390 Spanish	GEN1390_SP.pdf

4 REQUIREMENTS

Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2634	<p>Original:</p> <p>The CONTRACTOR shall update the GEN 1390 – Informing Notice Regarding an Action Taken on Your Case in the CalSAWS Software as follows:</p> <p>1) Update the "Name of Agency Providing Notice" field to be editable.</p> <p>2) Prepopulate work number address to: "The Work Number/Equifax 11432 Lackland Road St. Louis, MO 63146 1-800-367-2884 www.theworknumber.com"</p> <p>3) Update the form number from "GEN 1390" to CalSAWS standard naming/numbering format</p>	<p>1. Estimate is for updating the form in English and adding Spanish</p> <p>2. Spanish translations will be provided by the State.</p> <p>3. See DDID 2664 assumption for listing of the threshold languages included in the estimate.</p> <p>4. Estimate does NOT include any effort for modifying or creating new Functional Design Documents (FDDs) for forms being modified/migrated/created. Consortium staff will be modifying or creating FDDs.</p>	<p>With CA-215103 GEN 1390 will be updated to latest state version in English and Spanish version will be added to LRS/CalSAWS Template Repository and will be available for all 58 counties. All the fields are already editable including "Name of Agency Providing Notice" field.</p>

<p>Revised:</p> <p>The CONTRACTOR shall update the GEN 1390 – Informing Notice Regarding an Action Taken on Your Case in the CalSAWS Software as follows:</p> <p>1) Prepopulate work number address to: “The Work Number/Equifax 11432 Lackland Road St. Louis, MO 63146 1-800-367-2884 www.theworknumber.com”</p> <p>2) Update the form number from “GEN 1390” to CalSAWS standard naming/numbering format</p> <p>3) Add GEN 1390 (03/17) in Spanish to Template Repository</p>		
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California Statewide Automated Welfare System

Design Document

CA-215442

FCED: Infant Supplement Payment Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicholas Trusso
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/8/2020	1.0	Initial Document	Nicholas Trusso
8/6/2020	2.0	Updates from QA	Nicholas Trusso
9/22/2020	3.0	Automated Regression Test scope added	William Baretsky

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1 OVERVIEW

The Infant Supplement section on the Child Placement Detail page for Foster Care (FC) and on the Kin-GAP (KG) Rate Summary page for KG will be used to issue the Infant Supplement Payment (ISP) for all counties except Los Angeles.

1.1 Current Design

Currently, Los Angeles County uses the Additional Rate section to issue an ISP. The other 57 counties will issue Infant Supplements through the Infant Supplement section located on the Child Placement Detail page.

1.2 Requests

All counties except Los Angeles will use the Infant Supplement section to enter an Infant Supplement. The current logic that issues an ISP amount through the Additional Rate section will be used to also issue an ISP when the Infant Supplement section is used.

1.3 Overview of Recommendations

1. When a valid Infant Supplement record exists, the correct Infant Supplement Payment will be issued through EDBC.

1.4 Assumptions

1. Los Angeles county will continue to use the Additional Rate section to enter a valid Infant Supplement, there will be no updates to the current logic.
2. It is up to the county processing the FC EDBC to enter the appropriate Infant Supplement record. The EDBC logic will not differentiate which rate to choose between counties.
3. The changes in this design will follow the paradigm from DDID 2191 CA-207140 in that the ISP expenditure will be calculated and displayed on the EDBC budget section.
4. No specific NOA or Reports functionality will be updated with this SCR. Existing CalSAWS functionality will handle the updates to the Infant Supplement section.

2 RECOMMENDATIONS

When a valid Infant Supplement record exists for the benefit month, the correct Infant Supplement Payment amount will be issued.

2.1 Infant Supplement

2.1.1 Overview

The Infant Supplement section will be used to issue an ISP.

2.1.2 Description of Changes

1. The existing logic that issues an ISP when the Additional Payment section contains an Infant Supplement will also issue an ISP when the Infant Supplement section on the Child Placement Detail page for FC and on the Rate Summary page for KG is used.

2.1.3 Programs Impacted

FC, KG

2.1.4 Performance Impacts

None

2.2 Automated Regression Test

2.2.1 Overview

Create new automated regression test scripts to verify the Infant Supplemental Payment values for the FC and KG programs when the appropriate section of the Child Placement Detail page is filled out based on the county in context.

2.2.2 Description of Changes

1. Create a new automated script to verify the following fields on the Foster Care EDBC page when running EDBC to approve a new application with the Additional Rate (Los Angeles) or Infant Supplement (non-Los Angeles) section populated on the Child Placement Detail page for a 'Group Home' placement:
 - a. Infant Supplemental Payment
 - b. Infant Supplemental Rate Supplement Payment
2. Create a new automated script to verify the following fields on the Kin-GAP EDBC page when running EDBC to approve a new application

with the Additional Rate (Los Angeles) or Infant Supplement (non-Los Angeles) section populated on the Kin-GAP Rate Detail page for an 'Adoptive Homes' placement:

- a. Infant Supplemental Payment
- b. Infant Supplemental Rate Supplement Payment

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
685	<p>The CONTRACTOR shall update EDBC to issue the full Infant Supplement Payment when entered through the Infant Supplement Section of the Child Placement Detail Page.</p> <p>The CONTRACTOR shall update the corresponding claiming, fiscal, NOAs, and report functionality to account for the Infant Supplemental EDBC Payment Updates.</p>	<p>The Infant Supplement section will issue the appropriate amount.</p> <p>The changes in this design will follow the paradigm from DDID 2191 CA-207140 in that the ISP expenditure will be calculated and displayed on the EDBC budget section.</p> <p>No specific NOA or Reports functionality will be updated with this SCR. Existing CalSAWS functionality will handle the updates to the Infant Supplement section.</p>



California Statewide Automated Welfare System

Design Document

CA-215443

FCED: Add soft validation for FC/AAP/KG
programs on the Run EDBC page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nicholas Trusso
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/13/2020	1.0	Initial Document	Nicholas Trusso
8/10/2020	1.1	Updated per QA comments	Nicholas Trusso

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1 OVERVIEW

A soft validation on the Run EDBC page will be displayed for Foster Care (FC), Kin-GAP (KG), and Adoption Assistance Program (AAP) when birth country/citizenship information has not been entered.

1.1 Current Design

Currently there is no validation message in CalSAWS/LRS to notify the worker that birth country/citizenship information is missing.

1.2 Requests

A soft validation, which will not prevent the user from running the EDBC, will be displayed on the Run EDBC page for FC, KG and AAP when Birth Country information is missing on the Individual Demographics page or when citizenship information is missing on the Citizenship Detail page.

1.3 Overview of Recommendations

1. Update the Run EDBC validation logic to display a soft validation for FC, KG and AAP when birth country/citizenship information has not been entered.

1.4 Assumptions

1. No change to the existing no-touch LA county process.

2 RECOMMENDATIONS

The Run EDBC validation logic will be updated to display a soft validation for FC and KG on the Run EDBC page when Birth Country information is not entered on the Individual Demographics page or when citizenship information is not entered on the Citizenship Detail page and the worker clicks the Run EDBC button.

2.1 Run EDBC

2.1.1 Overview

Soft validation message is displayed on the Run EDBC page when birth country/citizenship information is not entered.

2.1.2 Run EDBC Mockup

The screenshot shows the 'Run EDBC' page within a web application. The top navigation bar includes tabs for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'Eligibility' tab is active. The page title is 'Run EDBC'. Below the title, there is a legend: '*- Indicates required fields'. To the right of the legend are three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'. The 'Benefit Processing Range' section shows 'Begin Month: *' with a dropdown set to '07/2020' and 'End Month: *' with a dropdown set to '08/2020'. Below this is a table with columns: Program, Status, Timely Notice Exception, Reason, and Run Reason. The table has one row: 'Foster Care' with status 'Pending'. Below the table, a red error message states: 'Foster Care: Country of birth/High-dated Immigration record is missing for First Last.' Below the message, it says: 'To continue running EDBC, click the "Run EDBC" button.' At the bottom of the form area, there are three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'. A footer bar at the very bottom states: 'This Type 1 page took 0.53 seconds to load.'

Program	Status	Timely Notice Exception	Reason	Run Reason
Foster Care	Pending			

Figure 2.1.1 – Run EDBC Mockup

2.1.3 Description of Changes

1. Soft validation message '[Program]: Country of birth/High-dated Immigration record is missing for [First Name] [Last Name]' displayed when either of the below conditions are met and the worker clicks the Run EDBC button:

- a. Birth Country information is not entered on the Individual Demographics page.
- b. When citizenship information is not entered on the Citizenship Detail page and the birth country is anything other than United States.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

No page mapping changes are needed.

2.1.7 Page Usage/Data Volume Impacts

No expected impacts to page usage or data volume impacts.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
7	The CONTRACTOR shall add a SOFT validation for all 58 counties on the Run EDBC page to notify the worker that birth country/citizenship information has not been entered for Foster Care, AAP and Kin-GAP programs. (Will not affect no-touch LA County process).	These validations will be displayed on clicking the Run EDBC button on the page.



California Statewide Automated Welfare System

Design Document

CA-215449

FCED: Aid Code 45 Eligibility Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Munce, Nicholas Trusso, Naveen Bhumandla
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/30/2020	1.0	Initial Version	Brian Munce, Nicholas Trusso, Naveen Bhumandla
07/16/2020	1.1	Updated after committee review	Brian Munce, Nicholas Trusso
08/07/2020	1.2	QA Updates	Nicholas Trusso

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1 OVERVIEW

The county funded aid code '45 – FC (County)' is determined for the Foster Care (FC) program when they fail to meet the Federal, State and Emergency Assistance requirements. The Child Placement Detail page will be updated to include a new field to determine the county funded aid code '45 – FC (County)'.

The Medi-Cal (MC) auto-test logic will be updated to set the Requested Medi-Cal Type to FC Unpaid (45) when the FC program is discontinued for specific reasons.

1.1. Current Design

The county funded aid code is determined for the FC program when the federal, state or emergency assistance requirements are not met.

MC is auto-tested when the FC program is closed and meets the auto-test criteria.

1.2. Requests

Add a new field on the Child Placement Detail page that will be used to determine the county funded aid code when the child does not meet Federal, State and Emergency Assistance requirements. The existing eligibility determination benefit calculation (EDBC) rule to determine the county funded aid code will be updated to check the value of the new field added to the Child Placement Detail page.

Update the MC auto-test logic to set the Requested Medi-Cal Type to 'FC Unpaid (45)' when the FC program is closed for one of the following reasons: 'Child Not In Placement' and 'Whereabouts Unknown'.

1.3. Overview of Recommendations

1. Add a new field to the Child Placement Detail page, 'Use County Funds'.
2. Update the existing EDBC rule to determine the county funded aid code '45 – FC (County)' when the 'Use County Funds' indicator is 'Yes'.
3. Update the auto-test logic for MC program to set the Requested Medi-Cal Type to 'FC Unpaid (45)' when the FC program is closed for one of the following reasons: 'Child Not In Placement', 'Whereabouts Unknown'.

1.4. Assumptions

None

2 RECOMMENDATIONS

The Child Placement Detail page will be updated with a new field that allows the Worker to indicate if county funds for the placement should be used or not for the placement.

The EDBC rules to determine the aid code to '45 – FC (County)' will be updated to check the value of the 'Use County Funds' field.

The EDBC logic to auto-test MC will be updated to set the Requested Medi-Cal Type to 'FC Unpaid (45)' when the FC program is discontinued for 'Child Not In Placement' or 'Whereabouts Unknown'.

A new field will be added to the CalSAWS interface transaction file layout and the corresponding transaction code will be updated accordingly.

2.1. Child Placement Detail

2.1.1 Overview

The Child Placement Detail page will be updated to allow the Worker to indicate whether county funds should be used for a given placement.

2.1.2 Child Placement Detail Mockup

Child Placement Detail

*- Indicates required fields

Save and Return Cancel

Child Name: Lastname, Firstname 16M	Placement Name: * My Placement Select	Placement Type: * Foster Family Agency (T) ▼
Payee: Same as Placement	Care Provider Relationship to Child: ▼	Placement Location: ▼
Use County Funds: * No ▼		
Begin Date: * 04/30/2020	End Date: 	
Placement ID: 807293095		

Rate List *						
Type	Rate	Level Of Service	Level of Care	Begin Date	End Date	
Standard State Rate				07/01/2020		Edit
						Add

Infant Supplement			
Infant Name	Begin Date	End Date	
No Data Found			
			Add

Figure 2.1.2 – Child Placement Detail

2.1.3 Description of Changes

1. Add the 'Use County Funds' required field to the Child Placement Detail page.
 - a. The available options will be 'Yes' and 'No'.
 - b. 'No' will be selected as the default option for new records.

2.1.4 Page Location

- Global: Eligibility
- Local: Customer Information
- Task: Child Placement

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mapping to include the newly added 'Use County Funds' field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2. Update FC EDBC Aid Code Determination

2.2.1 Overview

The EDBC rule to determine the county funded aid code '45 – FC (County)' will be updated to check the value of the 'Use County Funds' indicator.

2.2.2 Description of Changes

1. When the FC program does not meet the Federal, State or Emergency Assistance aid code requirements, but meets the program requirements for the county funded aid code, and
 - a. The 'Use County Funds' flag on the Child Placement Detail page is 'Yes'.
 - i. Set the Aid Code for the FC EDBC to '45 – FC (County)'.
 - b. The 'Use County Funds' flag on the Child Placement Detail page is 'No'
 - i. The FC program will be closed for 'Doesn't Meet Program Req.'.
2. When the FC program does not meet the program requirements for the county funded aid code and the 'Use County Funds' flag on the Child Placement Detail page is 'Yes'
 - a. The FC program will be closed for 'Doesn't Meet Program Req.'.

2.2.3 Programs Impacted

FC

2.2.4 Performance Impacts

None

2.3. Update the Auto-Test Medi-Cal Logic

2.3.1 Overview

When the FC program is closed, the MC program is auto tested for eligibility. Update the auto test logic for the MC program to set the Requested Medi-Cal Type to 'FC Unpaid (45)'.

2.3.2 Description of Changes

1. Update the MC auto-test logic to set the Requested Medi-Cal Type of 'FC Unpaid (45)' when the FC program is discontinued for either of the following reasons:

- a. 'Child Not In Placement' (CT73_WI)
- b. 'Whereabouts Unknown' (CT73_07)

2.3.3 Programs Impacted

MC

2.3.4 Performance Impacts

None

2.4. Interface Changes

2.4.1 Overview

LRS/CalSAWS Department of Children and Family (DCFS) Interface processing will update 'Use County Funds' flag when DCFS sends child placement transactions.

2.4.2 Description of Change

LRS/CalSAWS DCFS Interface will always update 'Use County Funds' flag to **Yes** for all foster care child placement transactions that are sent by DCFS Datamart in the foster care file.

2.4.3 Execution Frequency

Daily.

2.4.4 Key Scheduling Dependencies

No Change.

2.4.5 Counties Impacted

LA County.

2.4.6 Data Volume/Performance

No Impact

2.4.7 Interface Partner

DCFS

2.4.8 Failure Procedure/Operational Instructions

2.5. Data Change

2.5.1 Overview

A data change will be run to update all existing Los Angeles County Child Placements records regardless of effective begin and end dates, to have the 'Use County Funds' indicator set to 'Yes'.

2.5.2 Description of Change

1. Update the value of the 'Use County Funds' field on the Child Placement Detail page to 'Yes' for all existing Los Angeles County Child Placements records regardless of effective begin and end dates.

2.5.3 Estimated Number of Records Impacted/Performance

Approximately 890000 child placement records at time of writing. No performance impact should be expected.

3 REQUIREMENTS

3.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
6	<p>The CONTRACTOR shall create the framework to allow the user to select a flag in CalSAWS system to determine and issue county funds for Foster Care (Aid code 45).</p> <p>The CONTRACTOR shall update the CalSAWS Software to auto test MC program with a Requested Medi-Cal type of "FC Unpaid (45)" when a Foster Care child is discontinued for "Child Not in Placement" or "Whereabouts Unknown".</p>	Child Placement Detail page is updated with a new field to indicate if the FC program should issue county funds.



California Statewide Automated Welfare System

Design Document

CA-215674

DDID 2326 FDS: GA GR - Root Questions

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Taylor Fitzhugh
	Reviewed By	Long Nguyen, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/20/2020	0.1	Initial Draft	Taylor Fitzhugh
09/09/2020	0.2	Committee review updates: Added Section 2.3 Updated Financial and Non Financial Questions for San Francisco, San Joaquin, and Fresno counties.	Taylor Fitzhugh

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DRAFT

1 OVERVIEW

1.1 Current Design

The CalSAWS solution has each question from the SAWS II PLUS application listed as root questions. These questions indicate a minimum set of data collection pages the users will need to populate prior to running EDBC. The questions are standard across all counties and broken into four categories: General Assistance/ General Relief, Cash, CalFresh, and Medi-Cal.

1.2 Requests

The root questions related to the General Assistance/ General Relief program will be unique depending on the county.

1.3 Overview of Recommendations

1. Update the Financial and Non-Financial Root Questions pages to display a unique set of General Assistance/General Relief questions based on the county of the logged in worker.

1.4 Assumptions

1. Existing logic tied to the Cash, CalFresh and Medi-Cal questions will remain unchanged.
2. Los Angeles County root questions will not be modified in association with this SCR.
3. Changes will be hidden for all General Assistance/General Relief changes related to the migration effort until the county's migration.
4. The active county of a user is displayed under the system name in the top-left corner of the application.

2 RECOMMENDATIONS

2.1 Non-Financial Root Questions

2.1.1 Overview

The Non-Financial Root Questions page will be updated to have a separate section for the county-specific questions related to General Assistance/General Relief.

2.1.2 Root Questions Mockup

Supplemental General Assistance/General Relief Statement of Facts		
1.	Do you own a home or are you buying real estate?	<input type="text" value="No"/>
2.	Have you stopped working in the last 90 days?	<input type="text"/>
a).	If so, please explain why the job ended.	<input type="text"/>
3.	In the past 30 days, explain how you have been supporting yourself?	<input type="text"/>
4.	Is anyone currently employed?	<input type="text"/>

Figure 2.1.2.1 – Root Questions (Sample)

2.1.3 Description of Changes

1. Add a new section titled, "Supplemental General Assistance/General Relief Statement of Facts" beneath the existing root question sections. This section will contain the Non-Financial root questions for the active county of the logged in user.
2. This section will only display for a case in which the county associated with the case has GA/GR Root questions and the case has one of the following programs:
 - a. General Assistance/General Relief (Program Code: GR)
 - b. General Assistance (Managed)
 - c. General Assistance (Non-Managed)
3. Specific questions, field type and numbering for each county question can be found in the supporting document, "Non-Financial Root Questions.xlsx" under the county-supported tab. Existing field size and character limits will apply for data input fields for the added root questions. Below is a list of field types listed in the supporting document:
 - a. Text – Free-form text fields will retain the character limit of 100 characters.
 - b. Date – Date fields will store date information in a MM/DD/YYYY format and will have a calendar icon to select the date.
 - c. Yes/No Dropdown – A dropdown field with the options of Yes and No. The default will be a blank selection.

d. None – No answer exists for this field.

Note: Numbers with a letter attached will only display the letter in “a).” format in the rows after the number.

4. Guided navigation options will be updated for each of the new questions based on the active county of the logged in user to link to a specific data collection page, if applicable. This list can be found in the supporting document, “Non-Financial Root Questions.xlsx”.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Root Questions

2.1.5 Security Updates

No security updates.

2.1.6 Page Mapping

No new page mappings are required.

2.1.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.2 Financial Root Questions

2.2.1 Overview

The Financial Root Questions page will be updated to have a separate section for the county-specific questions related to General Assistance/General Relief.

2.2.2 Root Questions Mockup

Supplemental General Assistance/General Relief Statement of Facts		
5.	Do you have any personal property that is not necessary for daily use such as guns, tools, sporting equipment, livestock, jewelry, artwork, antiques, collections, cameras, musical equipment?	<input type="text" value="No"/>
6.	Do you own any business property that is necessary for current or future employment such as tools, livestock, vehicles, computer equipment, inventory, or materials?	<input type="text"/>
7.	Have you received or expect to receive from any source, such as Worker's Comp, VA, UIB, SSI/SSP, Loans, Grants, Money from friends/relatives, or another type of Income?	<input type="text"/>

Figure 2.2.2.1 – Root Questions (Sample)

2.2.3 Description of Changes

1. Add a new section titled, "Supplemental General Assistance/General Relief Statement of Facts" beneath the existing root question sections. This section will contain the financial root questions for the active county of the logged in user.
2. This section will only display for a case in which the county associated with the case has GA/GR Root questions and the case has one of the following programs:
 - a. General Assistance/General Relief (Program Code: GR)
 - b. General Assistance (Managed)
 - c. General Assistance (Non-Managed)
3. The numbering for the "Supplemental General Assistance/General Relief Statement of Facts" section will continue the numbering from the "Supplemental General Assistance/General Relief Statement of Facts" section on the "Non-Financial Root Questions" page. See figures 2.1.2.2 and 2.2.2.2 for reference.
4. Specific questions, field type and numbering for each county question can be found in the supporting document, "Financial Root Questions.xlsx" under the county-supported tab. Existing field size and character limits will apply for data input fields for the added root questions. Below is a list of field types listed in the supporting document:
 - a. Text – Free-form text fields will retain the character limit of 100 characters.
 - b. Date – Date fields will store date information in a MM/DD/YYYY format and will have a calendar icon to select the date.
 - c. Yes/No Dropdown – A dropdown field with the options of Yes and No. The default will be a blank selection.
 - d. None – No answer exists for this field.

Note: Numbers with a letter attached will only display the letter in "a)." format in the rows after the number.

5. Guided navigation options will be updated for each of the new questions based on the active county of the logged in user to link to a specific data

collection page, if applicable. This list can be found in the supporting document, "Financial Root Questions.xlsx".

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Root Questions

2.2.5 Security Updates

No security updates

2.2.6 Page Mapping

No new page mappings are required

2.2.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.3 Data Collection Root Questions

2.3.1 Overview

On the list page of each page linked to root questions, the root questions appear in a dynamic section. This section will be updated to include the GR root questions for all 58 counties, if they are linked to a guided navigation page.

2.3.2 Root Questions Mockup

The mockup shows a section titled "Root Questions" with a dropdown arrow. Below the title is a list of three questions, each preceded by a red circular icon containing a white 'S'. The questions are: "Does everyone live in CA and expect to keep living here?", "Does anyone plan to leave California for more than 30 days?", and "When did you move into the county?". To the right of the list is a blue button labeled "Edit Root Questions". Below the list is another blue button labeled "Edit Root Questions".

Figure 2.3.2.1 – Root Questions (Sample)

2.3.3 Description of Changes

1. Update the Root Questions section that appears on the data collection list page to display the GR icon and GR root questions associated with that page based on the county of the case.
2. Add the root questions section to the following pages:
 - a. GR Health Assessment List
 - b. MSUDRP Pre-Screening List

2.3.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

2.3.5 Security Updates

No security updates

2.3.6 Page Mapping

No new page mappings are required

2.3.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

DRAFT

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	List of non-financial questions separated by county	Non-Financial Root Questions.xlsx
2	Online	List of financial questions separated by county	Financial Root Questions.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2326	The CONTRACTOR shall update the root questions page to add additional county specific GA/GR questions that will get generated with the Statement of Facts (SAWS II Plus) and SAWS I-additional screening questions. The CONTRACTOR shall display the additional GA/GR specific root questions related to the county of the logged in user.	Online: 1) No updates are required to data collection pages other than the Root Questions Page 2) No updates are required for the CalSAWS to generate the SAWS I and SASWII Plus with the updated root questions.	The General Assistance/General Relief Root Questions will be made unique per county and they will be printed on a supplemental General Assistance Statement of Facts document, when required.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-217595

Update GR Hearing notices to reflect
telephonic calls due to COVID-19

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/06/2020	1.0	Original Draft	Phong Xiong

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1 OVERVIEW

This SCR is to update the hearing information on GR Discontinuances and Benefit Change notices to change the location from a physical district office address to a telephonic call due to the delay in opening of the district offices due to COVID.

1.1 Current Design

Currently in CalSAWS due to COVID-19, the GR Discontinuances and Benefit Change NOAs contain hearing verbiage reflecting a physical district office location for customers to report in person.

1.2 Requests

As per the direction from LA County, update the GR hearing verbiage and appointments on the GR discontinuance and benefit change NOAs to reflect the verbiage related to telephonic appointment details.

1.3 Overview of Recommendations

1. Revise and create updated text to the hearing information on the GR Discontinuance and Benefit Change NOA templates.
 - a. GR_CHANGE_TEMPLATE XDP
 - b. GR_TERMINATION_TEMPLATE XDP
2. Update the DOC_DATA table with updated information.
 - a. The following columns are updated:
 - DEPTY_DIST_PH_NUM
 - LIAISON_NAME
 - LIAISON_PH_NUM
 - SUPRVSR_PH_HUM

1.4 Assumptions

1. The form number ABP 4023 is used for GR dynamic NOAs. The form number itself is dynamic and based on the type of NOA. For example, a GR benefit change will populate form number ABP 4023-C.
2. These updates are only completed in English and Spanish.
3. Both GR and GROW programs use the same dynamic template and the verbiage for both programs will be updated with this SCR.
4. There are no updates to the population logic of the information in the DOC_DATA table.
5. The two templates are only updated in English and Spanish. Since all other threshold languages for these templates are suppressed, customers who do not speak English and/or Spanish will receive a GEN1365.
6. The updates to DOC_DATA table are only made to LA County (County Code – 19).

2 RECOMMENDATIONS

Revised/create text and templates for the NOA templates below:

GR_CHANGE_TEMPLATE

GR_TERMINATION_TEMPLATE

Update the DOC_DATA Table with updated information:

Update existing columns with new values

2.1 Update the GR_CHANGE_TEMPLATE

2.1.1 Overview

The GR_CHANGE_TEMPLATE is used for dynamic GR & GROW NOA fragments for benefit changes.

State Form/NOA: N/A

Existing Template Revision Date: ABP 4023 (revision N/A)

Current Program(s): General Relief & GROW

Includes NA Back 9: No

Existing Languages:

Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese

2.1.2 Description of Change

Update the hearing information on the GR_CHANGE_TEMPLATE to reflect telephonic appointment details for both GR and GROW.

NOA Mockups/Examples: See Supporting Document #1

GR Screenshots/Changes:

Hearing Information

- ¹ ~~A hearing has been set.~~ A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
1. You think this is a mistake; or
 2. You have a good reason why you did not comply.

³ Hearing Officer Number:
{LiaisonPhoneNumber}

⁴ **Please call the Customer Service Center at (866) 613-3777 if:**

1. You have trouble reading this notice.
2. You do not understand this notice.
3. You think this is a mistake.
4. You have any questions.

What You Can Do To Keep your GR Cash Aid

- ⁵ 1. **Contact your GR worker** at (866) 613-3777 before {EffectiveChangeDate} to:
 - Complete the work activity; or
 - Explain why you did not complete it.
- ⁶ 2. **Contact the Hearing Officer**
 - This is your final chance to tell your side of the story before your GR cash aid is changed.
 - You can learn more about the hearing on the other side of this Notice.
 - The hearing officer can stop the change to your GR cash aid.
3. **Do your GR Activity**
 - If the hearing officer does not stop this action, you can still keep your GR cash aid by doing your GR activity by {ThirdThursdayDate}.

To prepare for the hearing:

- ⁷ ~~See page 1 for your hearing date, time, and location.~~
- Before your hearing, you can look at your GR file ~~at the DPSS office.~~ ⁸
 - You can ⁹ provide any documents or people you think can help at the hearing, but no documents or witnesses are required.

Updated Templated Layout for GR Program:

Number	Existing Text	Updated Text
1	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
2	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
3	<u>When is my GR Hearing?</u> *{DateandTimefield} <u>Where is my GR Hearing?</u> **{OfficeAddress}	<u>Hearing Officer Phone Number:</u> {LiaisonPhoneNumber}
4	Please call the Customer Service Center at ***{CustomerCareNumber} if :	Please call the Customer Service Center at (866) 613-3777 if:
5	Contact your GR worker In person or call ***{CustomerCareNumber} before {EffectiveChangeDate} to:	Contact your GR worker at (866) 613-3777 before {EffectiveChangeDate} to:
6	Attend your GR Hearing	Contact the Hearing Officer
7	See page 1 for your hearing date, time, and location.	Remove
8	Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can look at your GR file at the DPSS office.
9	You can bring any documents or people you think can help at the hearing, but no documents or witnesses are required.	You can provide any documents or people you think can help at the hearing, but no documents or witnesses are required.

NOA Mockups/Examples: See Supporting Document #2

GROW Screenshots/Changes:

Hearing Information

- ¹ ~~A hearing has been set.~~ A hearing is a meeting with
² a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
1. You think this is a mistake; or
 2. You have a good reason why you did not comply.

³ Hearing Officer Number:
{LiaisonPhoneNumber}

What You Can Do To Keep your GR Cash Aid

- ⁴ **1. Contact your GROW worker at (866) 613-3777** before {EffectiveChangeDate} to:
 - Complete the work activity; or
 - Explain why you did not complete it.
- ⁵ **2. Contact the Hearing Officer**
 - This is your final chance to tell your side of the story before your GR cash aid is changed.
 - You can learn more about the hearing on the other side of this Notice.
 - The hearing officer can stop the change to your GR cash aid.
- 3. Do your GROW Activity**
 - If the hearing officer does not stop this action, you can still keep your GR cash aid by doing your GR activity by {ThirdThursdayDate}.

To prepare for the hearing:

- ~~See page 1 for your hearing date, time, and location.~~⁶
- Before your hearing, you can look at your GR file ~~at the DPSS office.~~⁷
 - You can ⁸ **provide** any documents or people you think can help at the hearing, but no documents or witnesses are required.

Updated Templated Layout for GROW Program:

Number	Existing Text	Updated Text
1	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:

2	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
3	<u>When is my GROW Hearing?</u> *{DateandTimefield} <u>Where is my GROW Hearing?</u> **{OfficeAddress}	<u>Hearing Officer Phone Number:</u> {LiaisonPhoneNumber}
4	Contact your GROW worker In person or call ***{CustomerCareNumber} before {EffectiveChangeDate} to:	Contact your GROW worker at (866) 613-3777 before {EffectiveChangeDate} to:
5	Attend your GR Hearing	Contact the Hearing Officer
6	See page 1 for your hearing date, time, and location.	Remove
7	Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can look at your GR file at the DPSS office.
8	You can bring any documents or people you think can help at the hearing, but no documents or witnesses are required.	You can provide any documents or people you think can help at the hearing, but no documents or witnesses are required.

2.1.3 Turn Off Threshold Language Fragments

The following languages will be turned off for this template, as these updates are only in English and Spanish:

- Armenian
- Cambodian
- Chinese
- Farsi
- Korean
- Russian
- Tagalog
- Vietnamese

2.1.4 Update Fragment Variable Population

The following variables are updated/removed/added on the GR_CHANGE_TEMPLATE for both GR and GROW programs.

Variable Name	Add/Remove/Update	Population	Formatting
*{DateandTimefield}	Remove		
**{OfficeAddress}	Remove		
{LiaisonPhoneNumber}	Add	Populates with LIAISON_PH_NUMBER from DOC_DATA table.	Arial Font Size 10
***{CustomerCareNumber}	Remove		

2.2 Update the GR_TERMINATION_TEMPLATE

2.2.1 Overview

The GR_TERMINATION_TEMPLATE is used for dynamic GR NOA fragments for discontinuances.

State Form/NOA: N/A

Existing Template Revision Date: ABP 4023 (revision N/A)

Current Program(s): General Relief

Includes NA Back 9: No

Existing Languages:

Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, and Vietnamese

2.2.2 Description of Change

Update the hearing information on the GR_TERMINATION_TEMPLATE to reflect telephonic appointment details.

NOA Mockups/Examples: See Supporting Documents #3

GR Screenshots/Changes:

TO REMAIN ELIGIBLE FOR GR YOU MUST RESOLVE EACH NON-COMPLIANCE BY:

1. Requesting a Noncompliance Review by an Eligibility Worker or GROW Case Manager if your noncompliance is GROW related.
2. Contacting the Hearing Officer as indicated on the Notice of Action. ¹
3. Resolving each non-compliance reason separately or on the same day as your Hearing appointment.
4. Complying, providing good cause, or disagreeing with each noncompliance action on or before the third Thursday of the month following the termination of your benefits.

Hearing Information

- ² ~~A hearing has been set.~~ A hearing is a meeting with
- ³ a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
1. You think this is a mistake; or
 2. You have a good reason why you did not comply.

⁴ Hearing Officer Number:
{LiaisonPhoneNumber}

⁵ **Please call the Customer Service Center at (866) 613-3777 f:**

1. You have trouble reading this notice.
2. You do not understand this notice.
3. You think this is a mistake.
4. You have any questions.

What You Can Do To Keep your GR Cash Aid

1. **Contact your GR worker** at (866) 613-3777 ⁶ before {EffectiveChangeDate} to:
 - Complete the work activity; or
 - Explain why you did not complete it.
2. **Contact the Hearing Officer** ⁷
 - This is your final chance to tell your side of the story before your GR cash aid is changed.
 - You can learn more about the hearing on the other side of this Notice.
 - The hearing officer can stop the change to your GR cash aid.
3. **Do your GR Activity**
 - If the hearing officer does not stop this action, you can still keep your GR cash aid by doing your GR activity by {ThirdThursdayDate}.

To prepare for the hearing:

- ~~See page 1 for your hearing date, time, and location.~~ ⁸
- Before your hearing, you can look at your GR file ~~at the DPSS office.~~ ⁹
- You can **provide** ¹⁰ any documents or people you think can help at the hearing, but no documents or witnesses are required.

Updated Template Layout for GR Program:

Number	Existing Text	Updated Text
1	Attending your Hearing Appointment on the date and time indicated on the Notice of Action.	Contacting the Hearing Officer as indicated on the Notice of Action.
2	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
3	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
4	When is my GR Hearing? *{DateandTimefield} Where is my GR Hearing?	Hearing Officer Phone Number: {LiaisonPhoneNumber}

	**{OfficeAddress}	
5	Please call the Customer Service Center at ***{CustomerCareNumber} if :	Please call the Customer Service Center at (866) 613-3777 if:
6	Contact your GR worker In person or call ***{CustomerCareNumber} before {EffectiveChangeDate} to:	Contact your GR worker at (866) 613-3777 before {EffectiveChangeDate} to:
7	Attend your GR Hearing	Contact the Hearing Officer
8	See page 1 for your hearing date, time, and location.	Remove
9	Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can look at your GR file at the DPSS office.
10	You can bring any documents or people you think can help at the hearing, but no documents or witnesses are required.	You can provide any documents or people you think can help at the hearing, but no documents or witnesses are required.

NOA Mockups/Examples: See Supporting Documents #4

GROW Screenshots/Changes:

TO REMAIN ELIGIBLE FOR GR YOU MUST RESOLVE EACH NON-COMPLIANCE BY:

1. Requesting a Noncompliance Review by an Eligibility Worker or GROW Case Manager if your noncompliance is GROW related.
2. Contacting the Hearing Officer as indicated on the Notice of Action. ¹
3. Resolving each non-compliance reason separately or on the same day as your Hearing appointment.
4. Complying, providing good cause, or disagreeing with each noncompliance action on or before the third Thursday of the month following the termination of your benefits.

Hearing Information

- ² ~~A hearing has been set.~~ A hearing is a meeting with
³ a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
1. You think this is a mistake; or
 2. You have a good reason why you did not comply.

⁴ Hearing Officer Number:
{LiaisonPhoneNumber}

What You Can Do To Keep your GR Cash Aid

- ⁵ **1. Contact your GR worker at (866) 613-3777** before {EffectiveChangeDate} to:
 - Complete the work activity; or
 - Explain why you did not complete it.
- ⁶ **2. Contact the Hearing Officer**
 - This is your final chance to tell your side of the story before your GR cash aid is changed.
 - You can learn more about the hearing on the other side of this Notice.
 - The hearing officer can stop the change to your GR cash aid.
- 3. Do your GR Activity**
 - If the hearing officer does not stop this action, you can still keep your GR cash aid by doing your GR activity by {ThirdThursdayDate}.

To prepare for the hearing:

- ~~See page 1 for your hearing date, time, and location.~~⁷
- Before your hearing, you can look at your GR file ~~at the DPSS office.~~⁸
 - You can provide⁹ any documents or people you think can help at the hearing, but no documents or witnesses are required.

Updated Template Layout for GROW Program:

Number	Existing Text	Updated Text
1	Attending your Hearing Appointment on the date and time indicated on the Notice of Action.	Contacting the Hearing Officer as indicated on the Notice of Action.

2	A hearing has been set. A hearing is a meeting with a GR Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
3	A hearing has been set. A hearing is a meeting with a GROW Supervisor who was not part of the original decision. You should go to the hearing if:	A hearing has been set. A hearing is a meeting with a Hearing Officer who was not part of the original decision. You should call the Hearing Officer if:
4	<u>When is my GROW Hearing?</u> *{DateandTimefield} <u>Where is my GROW Hearing?</u> **{OfficeAddress}	<u>Hearing Officer Phone Number:</u> {LiaisonPhoneNumber}
5	Contact your GROW worker In person or call ***{CustomerCareNumber} before {EffectiveChangeDate} to:	Contact your GROW worker at (866) 613-3777 before {EffectiveChangeDate} to:
6	Attend your GROW Hearing	Contact the Hearing Officer
7	See page 1 for your hearing date, time, and location.	Remove
8	Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can look at your GR file at the DPSS office.
9	You can bring any documents or people you think can help at the hearing, but no documents or witnesses are required.	You can provide any documents or people you think can help at the hearing, but no documents or witnesses are required.

2.2.3 Turn Off Threshold Language Fragments

The following languages will be turned off for this template, as these updates are only in English and Spanish:

- Armenian
- Cambodian
- Chinese
- Farsi
- Korean
- Russian
- Tagalog
- Vietnamese

2.2.4 Update Fragment Variable Population

The following variables are updated/removed/added on the GR_TERMINATION_TEMPLATE for both GR and GROW programs.

Variable Name	Add/Remove/Update	Population	Formatting
*{DateandTimefield}	Remove		
**{OfficeAddress}	Remove		
{LiaisonPhoneNumber}	Add	Populates with LIAISON_PH_NUMBER from DOC_DATA table.	Arial Font Size 10
***{CustomerCareNumber}	Remove		

2.3 Update the DOC_DATA Table

2.3.1 Overview

The DOC_DATA table contains information that is used to populate addresses, phone numbers, and names of district offices/personnel. The information from this table is pulled to populate for hearing information and other similar NOAs.

2.3.2 Description of Change


2.3.2.1 Update Values in Existing DOC_DATA Columns

The following list shows what columns in the DOC_DATA table that needs to be updated, please refer to **supporting document #5** for the updates with red text:

- DEPTY_DIST_PH_NUM
- LIAISON_NAME
- LIAISON_PH_NUM
- SUPRVSER_PH_NUM

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
--------	-----------------	-------------	------------

1	Form	GR Change Template Mockup	GR_Mockup_CHANGE_TEMPLATE.pdf GR_Mockup_CHANGE_TEMPLATE_SP.pdf
2	Form	GROW Change Template Mockup	GROW_Mockup_CHANGE_TEMPLATE.pdf GROW_Mockup_CHANGE_TEMPLATE_SP.pdf
3	Form	GR Termination Template Mockup	GR_Mockup_TERMINATION_TEMPLATE.pdf GR_Mockup_TERMINATION_TEMPLATE_SP.pdf
4	Form	GROW Termination Template Mockup	GROW_Mockup_TERMINATION_TEMPLATE.pdf GROW_Mockup_TERMINATION_TEMPLATE_SP.pdf
5	Excel Sheet	Revised DOC_DATA table	DOC_DATA_REVISED_07-08-20.xlsx  DOC_DATA_REVISED_07-08-20.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices;	Update GR_CHANGE_TEMPLATE & GR_TERMINATION_TEMPLATE with appropriate verbiage

	<ul style="list-style-type: none"> m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	
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